the gild group

thegildgroup.com

Adviser Profile.

Stephanie Stacey
Financial Adviser

Bachelor of Business (Financial Planning)
Bachelor of Business (Accountancy)
Registered Tax (Financial) Adviser

Mobile 0423 214 777

Email stephanie.stacey@thegildgroup.com

Website www.thegildgroup.com/wealth

About Stephanie

As an Adviser I find the most satisfaction in my work when I can provide my clients with clarity, direction and understanding of their financial position and future. In my client relationships, I enjoy being the soundboard for financial decisions, celebrating my client's financial and personal wins throughout their journey, and working with my clients to find solutions to their roadblocks.

I have an excitement and sense of responsibility for my client's financial literacy and am committed to elevating my clients' understanding and confidence to make financial decisions and manage their wealth together. I strongly believe that empowering clients over time to collaborate with their adviser enables a closer alignment of financial strategies with client goals. To me, this is fundamentally important because while we know the strategies, your goals are the reason we're here.

Outside work you'll find me; outside. I enjoy spending time with family and friends, camping, running and occasionally snowboarding. Being involved in my local running community keeps me fit, laughing and humble where there's even a slight incline involved.

I am authorised to provide advice on the following areas on behalf of Gild Wealth:

Financial Products

Life Products including:
- Investment life insurance products
- Life risk insurance products

Superannuation products, including:
- Public Offer Superannuation Funds
- Account Based Pensions
- Self-Management Super Funds (SMSF)
- Annuities

Managed investment products, including:
- IDPS
- Managed Trusts
- Master Trusts, Wrap Facilities
- Property Syndicates
- Tax Effective Investments
- Retirement savings accounts

Government Bonds, Stocks or Debentures Securities including:
- ASX listed shares, instalment warrants & fixed interest

This Adviser Profile is part of the Gild Wealth Pty Ltd Financial Services Guide (FSG) and should be read in conjunction with this document. If you have any questions after reading the information provided, I am happy to discuss them with you.

5 May 2023 (V1)

Gild Wealth Pty Ltd
ABN: 52 090 647 984 AFSL: 222154
445 Warrigal Road, Moorabbin VIC 3189
P: 03 9520 2999 E: wealth@thegildgroup.com