



## Welcome to Glennen Financial Planning

*Glennen Financial Planning was established to provide the people of Echuca and surrounding districts access to professional financial planning advice in a relaxed and comfortable manner.*

*We have been in the financial services industry for over 40 years, with combined experience of over 65 years. In this time, we have surrounded ourselves with a dedicated network of industry professionals who support our capabilities and add value to the services we provide.*

*We help people to make smart, informed financial decisions throughout their lives ... so they can confidently make, grow and protect the funds they need to achieve the goals and lifestyle they desire.*

*We offer tailored financial guidance and direction to lead to the following outcomes:*

- *Ongoing wealth accumulation planning via investments and superannuation; -*
- *Safeguarding not only your wealth and assets but protecting your family against financial difficulties; involving Income protection, Life, TPD, Trauma and Key Person Insurance*
- *Minimising taxation while still working; - Transition to Retirement*
- *Getting you ready for a comfortable retirement; - Retirement Planning*
- *Maximising your social security entitlements; - Centrelink*
- *Transitioning to aged care for you or a loved one; - Aged Care*
- *Assistance with your Self Managed Super Fund to ensure you have a good spread of investments in line with your Investment strategy.*
- *Organising your estate plans. – Estate Planning*

## Our Vision

*Our vision is to become Echuca and surrounding districts' foremost provider of financial advice, renowned for our down-to-earth and caring approach, our depth of expertise, our helpful public education program and our continued success in helping our clients achieve their financial goals.*

## Our Mission

*Our purpose is to help the people of Echuca and surrounding districts to achieve their financial and lifestyle goals by providing them with high quality financial advice and services.*

*We do this by:*

*Educating and coaching them on their available options so they can make informed financial decisions; Supporting our clients with unbiased, concise and plain English guidance on making, growing, protecting and maintaining their wealth as they journey through life; keeping abreast of latest financial industry knowledge, conditions and strategies to ensure our clients benefit from up-to-date advice; and maintaining a lifetime partnership with our clients to ensure their financial objectives and lifestyle goals are ultimately met.*

## Paul Glennen -Director/Qualified Financial Planner

*Paul was employed by one of the major banks for 36 years, he has spent the last 12 years as a Financial Planner. Paul holds an Advanced Diploma in Financial Planning, a Certificate IV in Mortgage Broking and is also accredited to provide Self Managed Superannuation Advice. Paul has lived in Moama for the past 18 years and his professional dealings in the Echuca/Moama and Shepparton areas have gained him a solid reputation as an honest and reliable person who puts people at ease and relates to his clients in easy to understand terms.*

## Sue Glennen -Business Manager

*Sue was also employed by one of the major banks for 15 years prior to working in an accounting firm for 5 years where she attained her Diploma in Business Accounting. Sue has also spent the past 8 years in the Financial Planning Industry as a Business Manager. Sue describes her role as working 'on' the business rather than 'in' it. Sue also has attained her Certificate IV in Mortgage Broking.*

## Kim Perkins -Administration Manager

*Kim is a welcome addition to our business, she has had 7 years Financial Planning experience and in this time she has attained her Diploma in Financial Services. Kim is a local girl with a young family who has a real desire to continue developing her career within the Financial Planning industry.*

## Chloe Hughes -Client Services Assistant

*Chloe completed year 12 in 2013, graduating from Moama Anglican Grammar School. She worked on her family dairy farm for two years before she joined us where she has been learning about the finance world for the past 12 months. She is a bright and enthusiastic young woman who looks forward to making a positive contribution to the team and our clients. Chloe has completed her 12 month traineeship and attained her CertIV in Mortgage Broking. She is now going on to study her Diploma in Finance and Mortgage Broking.*

Glennen Financial Planning  
50 Heygarth Street, Echuca, VIC 3564  
PO Box 170, Echuca, VIC 3564  
Ph: (03) 5480 0300

Mob: 0417 157 606  
info@glennenfinancialplanning.com.au  
www.glennenfinancialplanning.com.au