

**Oakwood Financial Group Pty Limited**

ABN 11 063 291 163 AFSL 255231

Suite 201, Level 2, 13 Spring Street

Chatswood NSW 2067

**Phone** (02) 9419 5200

**Fax** (02) 9419 6500

## Staffing Structure

Sarah Cavanagh operates out of the offices of Adviser Partnership.

The aim is to provide a familiar team for ongoing management of your financial affairs. Sarah is the primary adviser working with clients and other professional advisers to ensure the correct balance is achieved in all areas of clients' financial affairs.

Sarah is supported by Anna Block with regard to detailed strategy advice and Susan Wilson ensures the day to day management of clients' affairs are maintained.

### ***Fiona Fawcett – B Ec (Hons) Grad Dip FP***

**ASIC Authorised Representative Number 240971**

#### **Memberships**

- Financial Planning Association

Fiona has over ten years' experience as a professional economist. Initially working with the Commonwealth Department of Treasury and later as a senior financial market economist with Rothschild Australia.

In 1999 Fiona made the transition to Financial Planning working with William M Mercer in Melbourne. On returning to Sydney Fiona joined Rhodes Docherty in 2003 as a Financial adviser and Investment Researcher.

Fiona draws on her economics and financial market experience to construct and maintain investment portfolios to suit a range of client objectives.

Fiona has strong technical skills and excellent interpersonal skills. She is consistently recognised for exceptional communication skills including an appreciation of the value of listening to people. She builds strong rapport with clients and operates with unquestioned integrity.

Fiona is known for her keen sense of curiosity and her intellectual capacity, which combine to produce the ability to think outside the box to develop great options and outcomes for clients. She is highly valued as a respected colleague and professional, and always recognised as a strong team player with the capacity and desire to work collaboratively and constructively with others.

### ***Anna Block – B Ec CFP Dip SM***

**ASIC Authorised Representative Number 341805**

#### **Memberships**

- Financial Planning Association

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**Para – Planning Support**

Anna holds a proper authority with Oakwood Financial Group and is a Certified Financial Planner. She has a Bachelor of Economics and has completed the Diploma of Superannuation Management and the Diploma of Financial Planning. Anna's main role is planning support whereby clients' strategies are discussed with Sarah to come up with the best solution for your personal situation.

Anna's role includes the following:-

- Preparation of statements of advice and records of advice for both new and existing clients;
- Analysis of a clients' financial position using Xplan software;
- Liaising with technical service teams;
- Attending technical updates to keep informed of new legislation.

***Susan Wilson***

**Client Services Manager**

Susan's role is to support the business in providing administration functions.

Under the guidance of the adviser:-

- Preparation and issuing of client letters / reviews;
- Preparation and issuing of administration platform applications / forms;
- Liaising with fund managers and clients via phone or email in respect of administrative matters;
- Diary management and scheduling of meetings.