

LIVE LIFE ON PURPOSE



HELEN RUSSO
Principal Adviser

Helping you get financially organised & plan for the future

Helen's passion is people and helping them achieve financial freedom which she believes is more than a large sum of money in the bank. With years of experience and expertise, Helen acts as a teacher, mentor and coach to help you live "your best life". Utilising a big picture approach, Helen takes time to learn who you really are and where you want to be. Understanding that everyone's needs are personal and unique, she seeks to bring clarity, direction and certainty to her clients' financial universe.



Collaborating with other service providers



Protecting families and individuals from asset dilution



Estate and Legacy Planning



Aim to preserve and grow wealth

EXPERIENCE AND QUALIFICATIONS

Master of Financial Planning
Adv Diploma of Financial Planning
Graduate Certificate of Financial Psychology
Accredited Age Care Specialist
Accredited Collaborative Law (Financial Planner)
Accredited Retirement & Transition Coach
Certificate IV TAE
Diploma of Life Coaching
Certified Financial Planner (FPA)

CONTACT DETAILS

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OUR ROADMAP TO YOUR SUCCESS



STEP 1 DISCOVERY

Enrich your life by understanding where you are now.

Encouragement

Nurturing

Relationships

Interests

Career, Cash Flow & Capital Position (Net Worth)

Health



STEP 2 DESTINY

Create a vision of where you want to be in the next 3 and 10 Years?

Love, what are all the relationships in your life?

Live, how do you want to live your life?

Learn, what do you want to learn?

Legacy, what legacy do you want create?



STEP 3 DESIGN

Bring your **vision** to life by designing an action plan.

Destination

Estate planning

Strategies we use to achieve your 4 L's (love, live, learn, legacy)

Investment

Gaps and areas that need addressing

Needs



STEP 4 DECISIONS

We help you make **Decisions** and **ACT**.

Act on your decisions and

Commit to your plan in a considered

Timeframe

CLIENT TESTIMONIALS



"Helen Russo has been our financial planner for over six years now. We have been able to achieve a more stable financial situation, thanks to her wisdom and knowledge. We now have a plan for the future and we credit Helen with helping us to create that vision - you help us sleep at night. Helen is very understanding and brings experience and "big picture" thinking to our situation. Her ability to explain and describe has been essential to increasing our financial literacy. Most importantly, Helen is very compassionate and caring, which provides an essential component to our relationship with her. We have recommended Helen to friends and family and will continue to do so."

MARK AND JEN

"The difference of having you in my life is simple...following my divorce and settlement, I found myself having more money than I ever had before. Knowing how easy I would succumb to nibbling at that money, you planned and organised my finances that allows me to live my life - having holidays and plans for my future. Not having made big financial decisions previously I feel empowered, have peace of mind and am confident of my future and retirement .. no longer is superannuation and retirement (will I have enough to live my life) a scary topic!"

ANNIE