

## Adviser Profile version 2.1

### Natalie Conroy, CFP®



I am a born and bred Western Australian. When I am not working you could see me walking my Cavachon's at Carine or at a comedy show with my Irish Husband. I love the great outdoors, traveling with family and friends worldwide, and watching our magnificent west coast sunsets.

With an unrelenting commitment to the application of ethical best practices and nurturing long term commercial relationships, I have a deep conviction and a clear sense of purpose when dealing with complex wealth strategies.

I am a passionate advocate of helping others and aim to amplify values and long-term prosperity.

I provide bespoke and responsible advice suited to your objectives and believe that sound advice and planning is the key to improving your financial position.

I undertake continuous professional development training to keep current with legislative and economic updates.

I have access to technical, risk and investment research professionals who provide me with additional analysis on strategies and products that become available because of the multitude of ongoing changes.

### Why should you choose to partner with me?

I will help you sort out your goals and weigh up different investment strategies to achieve them.

Most importantly, I turn your thoughts into action.

There are no secret formulas for achieving financial security. I work with you to get the basics right and ensure you have a plan to achieve your goals over time.

I am looking to partner with you and celebrate milestones together.

### Natalie is authorised to provide advice in the following areas:

- Wealth creation
- Superannuation
- Pre-retirement
- Retirement
- Personal protection
- Budgeting and Cashflow
- Children's education
- Centrelink
- Aged Care
- Estate planning
- Intergenerational wealth
- Deposit and payment products
- Securities and direct equities
- Managed investments
- Superannuation funds
- Retirement savings accounts
- Self-Managed Superannuation Funds
- Life insurance
- Business insurance
- Annuities and Bonds
- Tax effective investments
- Interrelated structures

### Natalie's credentials

- FAAA Australia 2024/25 membership
- Certified Financial Planner™
- Bachelor of Commerce (B.Com, Curtin)
- Adv. Diploma of Financial Planning (ADFS)
- Diploma Financial Planning (DFS)
- SMSF Specialist Accreditation (SMSF)
- ASX Listed Product Accredited (ALPA)
- Aged Care Accredited

### Natalie's contact details

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This Adviser Guide should be read in conjunction with ANIG FSG V4.1 21/07/25.