

Patricia Plozza– Testimonial

In May of 2016, Lawrie O'Neill, our Financial Adviser and our Accountant, LlewEynon, of LG Accounting Solutions, came to visit us at our home in Eneabba.

We appreciate that they were able to work together to create a tax effective investment strategy, that was simple to understand.

It was important that we were still able to maintain 'active management' of our investments, so we were comfortable with the ETF portfolio and the individual funds selected.

We also discussed our financial concerns regarding our retirement; particularly our income and future cashflow.

We know that our subsequent reviews will involve succession planning for our farm and once again this will involve both our Financial Adviser and our Accountant.

Lawrie ensured that we understood the financial planning fees involved – both upfront for the advice and to implement the proposal, as well as ongoing for his regular review service.

While his initial contact was a visit to our home, he made it clear that subsequently, he was always available by email or phone call.

Overall, we are very happy with the recommendations he made and the service he provided.



Patricia Plozza