

**Ms Nicole Szollos  
Money Management**

I have great pleasure in putting forward a nomination for the Money Management Financial Planner of the Year. I would ask that you consider Lawrie O'Neill from Perth, Western Australia.

Having worked in this industry both here and abroad, I have had the opportunity to observe many financial planners at work in a changing and challenging environment. The investing public is becoming better educated in financial matters and more demanding. Products have become more sophisticated to reflect clients' needs and the legislative framework continues to challenge all who remain in this industry.

Financial planning has become a sophisticated industry; it requires substantial capital, both financial and intellectual. Over the last 13 years, working for a number of fund managers in Australia, I have had the opportunity to observe many of the planners who have adapted, grown and succeeded in this industry and it is one of these that I would like to nominate.

The acid test amongst fund managers when discussing our "customers" was "who would you send your family to?" This was often followed by an embarrassed silence. I too have hesitated in the past but as time has marched on my conviction in relation to referrals has firmed through my experience with Lawrie.

As I now run my own business I am not constrained as to what I can do and say. I spend most of my time in the public forum encouraging people to invest. Inevitably, I am asked by people to look at their affairs and make comment. It is not my intention to return to financial planning so I always felt disappointed having revved people up, to then walk away without offering a solution.

I have referred some in the past but with experience and growing confidence, I now refer all the time. I feel it is essential that having kindled the fire that it be fuelled. I have been referring both potential and existing investors to Lawrie for some time now. I have also sought feedback from those I have referred, as it is important because it ultimately reflects on me.

***Peter Thornhill***