

Introducing your Bridges financial planner



Chad Appleby

CFP®, B.Ec, DipFP

Authorised Representative's Number,
issued by the Australian Securities and
Investments Commission: 263894

Working with you

Seeking professional advice to help achieve your financial goals is an important investment in your future.

We are committed to working with you to define your goals and design a financial plan to meet your needs.

To arrange a complimentary, no obligation consultation with Chad, call
08 8202 7766

Chad Appleby has been employed within the financial services industry since 1999 and has been a paraplanner/financial planner with Bridges since 2002.

Prior to joining Bridges, Chad gained much of his early experience within the banking sector, before turning to paraplanning and now financial planning.

Chad is now a CERTIFIED FINANCIAL PLANNER™, after successfully completing his certification assessment in 2006. He also has a Bachelor of Economics degree from the University of Adelaide, and a Diploma of Financial Planning through Deakin University.

As an Authorised Representative of Bridges, Chad is able to assist clients with managing:

- **Wealth accumulation**
- **Superannuation and rollovers**
- **Retirement income planning**
- **Tax effective investment**
- **Social security entitlements**
- **Estate planning**
- **Insurance planning**

Backed by a team of leading research analysts, Chad also provides clients access to a range of leading Australian and international fund managers as well as listed investments.

Chad is committed to building long-term relationships with clients and providing them with the best in professional advice and personal service.

Chad Appleby is an Authorised Representative of Bridges Financial Services Pty Limited ('Bridges'). ASX Participant. AFSL Number 240837

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