

# 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**
- **Centrelink entitlements**
- **Estate planning**
- **Insurance planning**

Backed by a team of leading research analysts clients have 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 appropriate professional advice and personal ongoing service.

Chad Appleby is an Authorised Representative of Bridges Financial Services Pty Limited (Bridges) ASX Participant AFSL No 240837

Part of Australian Wealth Management

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**Bridges**  
*financial advice makes a difference*