



# Adviser Profile

“I am passionate about providing you with peace of mind. Working together, we create a financial strategy tailored to your dreams, goals and objectives.”

## Sophie Doyle

AdvDipFinPlan AFA member  
Authorised Representative 000470612

### Contact

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### Morgans

Ground Floor  
1/6 Burns Crescent  
Gosford NSW 2250  
Australia

Sophie has been working closely with advisers since 2014, developing strategies and building on her extensive technical knowledge. She has completed the Advanced Diploma of Financial Planning and will be undertaking further studies. Sophie has joined Morgans as an Associate Adviser and is looking forward to working with clients.

## Investment Style

Recognising each person has a unique set of circumstances, Sophie first seeks to gain a complete understanding of your financial position, needs and objectives. By taking a tailored approach, Sophie formulates a financial plan through a variety of strategies that she believes will best achieve your goals and objectives.

## Industry Education and Experience

### Qualifications

- Accredited Aged Care Professional™, Aged Care Steps, 2018
- Advanced Diploma of Financial Planning, Mentor Education, Melbourne, 2016
- Diploma of Financial Planning, Mentor Education, Melbourne, 2015

### Professional associations

- Association of Financial Advisers (AFA)

### ASIC approved competencies

- Financial Planning
- Life Insurance
- Securities
- Generic
- Managed Investments
- Superannuation

## Services and specialities

Aged Care

Financial Planning

Personal Insurance

Retirement and Estate Planning

Self Managed Super Funds

Superannuation Advice

*I am employed by Reldrive Pty Ltd which operates the business of Morgans Financial Limited – Gosford. My employer remunerates me as your adviser by way of salary. I am eligible to participate in a bonus scheme depending upon performance.*



To change  
your **future**  
shift your  
perspective