



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

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Morgans

Ground Floor
 1/6 Burns Crescent
 Gosford NSW 2250
 Australia

Services and specialities

- Aged Care
- Financial Planning
- Personal Insurance
- Retirement and Estate Planning
- Self Managed Super Funds
- Superannuation Advice

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

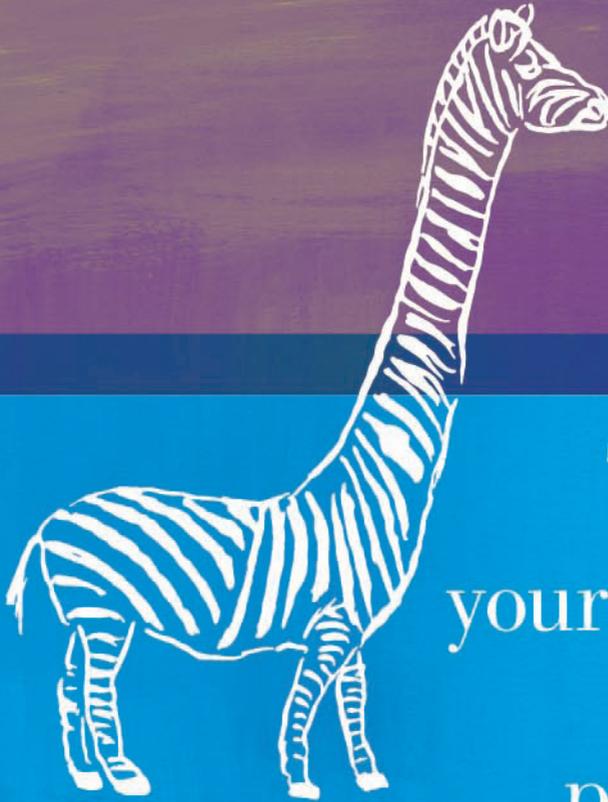
Professional associations

- Association of Financial Advisers (AFA)

ASIC approved competencies

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

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