

# Anne-Marie Humphries

## Financial Adviser Profile



### Financial Planning Expertise

Anne-Marie is a highly qualified and professional Financial Adviser.

With over 20 years experience in providing financial advice, Anne-Marie specialises in pre-retirement and retirement planning, self-managed superannuation and aged care advice.

Anne-Marie is a Director of Huon Financial Planning Pty Ltd and is the Practice Principal and Senior Financial Adviser.

Her extensive professional qualifications and broad experience ensures that you will receive high quality advice that is tailored to your specific needs and circumstances.

Anne-Marie will work closely with you to ensure you have a clear understanding of the financial strategy options available to you. Her goal is to help give you the confidence to make informed financial choices so you can achieve your best possible financial life.

### Advice Services Provided

#### Strategic Advice

- Superannuation
- Retirement Income Streams
- Self-Managed Superannuation Funds
- Aged Care Advice
- Centrelink – Eligibility & Advice
- Cashflow Planning
- Tax Planning Strategies
- Debt Management
- Securities
- Listed Equities
- Standard Margin Lending

#### Investment Advice

- Cash & Term Deposit Products
- Managed Investment Portfolios

#### Personal & Family Protection

- Personal Insurance Advice
- Estate Planning

Anne-Marie Humphries, Huon Financial Planning Pty Ltd ABN 44 143 918 781 is a Corporate Authorised Representative No. 381092 of Matrix Planning Solutions Limited ABN 45 087 470 200 AFSL & ACL No. 238256



Anne-Marie Humphries

### Qualifications

- Master of Financial Planning degree
- Certified Financial Planner (CFP)<sup>®</sup>
- SMSF Specialist Advisor (SSA)<sup>™</sup>
- Diploma of Financial Planning
- Bachelor of Economics

### Professional Memberships

- Member, Financial Planning Association of Australia Limited (FPA)
- Member, SMSF Association of Australia (SPAA).

### Contact Details

Huon Financial Planning Pty Ltd  
Suite 3, 497 Smollett Street  
Albury NSW 2640

T: 02 6023 2775

M: 0408 038 763

E: [anne-marie@huonfinancial.com.au](mailto:anne-marie@huonfinancial.com.au)

W: [www.huonfinancial.com.au](http://www.huonfinancial.com.au)