

# Anne-Marie Humphries

## Financial Adviser Profile

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### Financial Planning Expertise

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

With over 23 years experience in providing financial advice, Anne-Marie specialises in pre-retirement and retirement planning.

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 mean you will receive high quality advice that is tailored to your specific needs and objectives.

Anne-Marie will work closely with you to explain any recommendations we make for you and how they will help you to achieve the outcomes you are looking for.

Her goal is to give you the confidence to make informed financial choices so you can achieve your best possible financial life.

### Advice Services Provided

#### Strategic Advice

- Aged Care
- Deposit & Payment Products
- Government Debentures, Stocks or Bonds
- Investment Life Insurance Products
- Life Risk Insurance Products
- Managed Investment Schemes
- Margin Lending
- Retirement Savings Account Products
- Securities
- Self-Managed Superannuation Funds
- Superannuation



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### Qualifications

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

### Professional Memberships

- CFP Member, Financial Planning Association of Australia Limited (FPA)
- SMSF Specialist Member, SMSF Association

### Contact Details

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