

ADVISER TESTIMONIAL

Theo Marinis CFP®, B.A., B.Ec., CPA.

Financial Strategist | Authorised Representative | Responsible Manager



PROFESSIONAL PRACTICE

FAAQA FINANCIAL ADVICE
ASSOCIATION
AUSTRALIA



MARINIS
FINANCIAL GROUP

What did we want in a financial adviser back in 2007 - to be honest, we didn't really know. Appointing Marinis Financial Group (Marinis) was a bit of a leap of faith, based on recommendations, awareness that there were opportunities that might be being missed and 'gut feel'.

Fifteen years later and in our late 50's, we feel financially secure for retirement because we took the advice. While we raised our children we also contributed to super - and we 'protected' ourselves with insurance. This meant we had to forgo a few luxuries, but we were happy to do that in the knowledge we were 'getting ahead'.

Then we got a jolt. Anne was diagnosed with Primary Progressive Multiple Sclerosis (MS). She retired and we claimed a Trauma insurance payout of \$200,000 (the process was all handled very professionally by Marinis). We only had this cover because of Marinis's advice. We also have Total and Permanent Disability insurance of \$500,000, which

we hope to never claim on, but if we do it will help at a difficult time.

And in the background, our superannuation is growing at around \$27,500 pa based on Andrew's total work and personal concessional contributions plus it is currently generating \$95,000 pa on its own. Whatever the future holds physically and emotionally, we know that our finances are sorted, and we are delighted with the service, support and encouragement we have received.

Sincerely,

Anne and Andrew
Melbourne VIC



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- Anne and Andrew