

11/04/2022

The year 2015 was, for me at least, somewhat of a watershed in my life, necessitating some serious decision-making that would affect my financial future, so I went looking for a financial adviser to help me make those decisions.

Finding a financial advisor that you can trust and that you feel comfortable with is no easy task. I asked my colleagues, family and friends for advice and recommendations; a family member, whose friends had commented on how happy they were dealing with Theo Marinis, suggested I make an appointment with him.

The rest, as they say, is history. From my very first visit, I felt very comfortable and reassured dealing with Theo because of his ability to clearly explain in layman's terms the ins and outs of the options he outlined, taking into account my immediate and longer term goals; his professionalism, keeping abreast changes in legislation and the financial industry; his generosity in sharing his knowledge.

In subsequent visits, we put into place a plan for my financial future based on my plans and goals for the next three to five years. Of course, over time some of those plans and goals changed, however at every step of the way I've had the benefit of Theo's and his staff's advice whenever I've needed it.

Six years down the track, my most important financial goals have been realized and I am enjoying my retirement secure and comfortable in the knowledge that I have the expertise and advice of Theo and his staff to back me up.

I have in the past and will continue to highly recommend Theo Marinis and the staff of Marinis Financial Group to anyone out there who is looking for good, easy to understand financial advice.

With gratitude,

Rosemary P
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