Introducing the Adviser Council

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Madison Adviser Council

A representative group of Principals tasked with bringing fresh insights and thinking on emerging or unfamiliar issues, responding to ideas from Madison, willing to challenge assumptions and provide high quality objective advice to support the future success of our group.

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Council selection process

- A practice Principal
- A respected member of the Madison Community
- Advocates for the professional and commercial success of Madison, its Adviser community, and our Profession
- Diverse business and financial planning experience
- Has met, or is in the process of meeting FASEA educational requirements
- Is a member of a Professional Body (e.g., FPA, CPA, AFA)
- Has a strong record of quality compliance, as determined by the Madison leadership team
- Min 2-year term, option for additional 1 year

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Responsibilities

- Input and guidance on Madison key projects and initiatives, providing expertise and knowledge
- Provide counsel to ensure we deliver a balance between the voice of the Community and Madison business objectives
- Encourage and support the exploration of new business ideas and markets
- Contribute to the success of Madison and the Community. Provide ideas and insights to take advantage of industry opportunities and challenges
- Provide counsel, collaborative and constructive feedback in relation to policy and product development
- Foster open communication between advice community, Madison Head office & Board
- Be a representative voice for the advice profession (media, conferences, professional groups)

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Madison Adviser Council 2021 - 2023

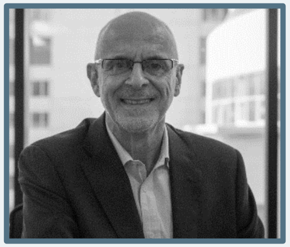
Naomi Alletson

John Francis

Paul Giordano

Megan Hodge

Meaghan Johns



Brian Lomas

Joe Mattar

Craig Muchamore

Don Sampson

Cassandra Sorby-Adams

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Representatives in Queensland

Megan Hodge

Your Wealthy Life

Area of expertise

Goals based, holistic advice and risk insurance focusing on accumulators and Military members

What does success look like?

- Bring back the joy in what we do, fun, happiness and purpose
- Improving the consumer experience
- Showcase Madison Advisers and the good client stories to Australia

Contact

P – 0401 252 973 E – megan@yourwealthylife.com.au

Naomi Alletson

Achieveit Financial Planning

Area of expertise

Small business, rural clients and everyday mum and dads.

What does success look like?

- At the forefront of change when it comes to government regulation
- Advocates for financial advice (which is an amazing profession)
- Madison as a dealer group of choice
- Community of collaborative small business owners

Contact

P – 07 4638 5011 E – nalletson@achieveitfp.com.au

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Representatives in New South Wales

John Francis

Halcyon Wealth Advisers, in partnership with Principal Advisers

Area of expertise

Holistic advice across generations

What does success look like?

- Facilitate sharing of knowledge within the community
- Improved efficiencies and leveraging specialisations within the community

Contact

P - 02 8920 8933   E - jfrancis@halcyonwealth.com.au

Paul Giordano

Vogue Financial

Area of expertise

Holistic advice with a passion for wealth creation, protection and management services

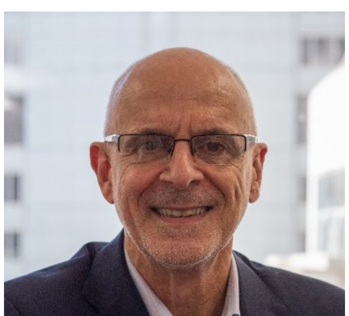
What does success look like?

- Delivery of advice and a better consumer experience
- Leverage the power of the collective group
- Licensee is delivering on its outcomes
- Represent the broader community

Contact

P – 1300 186 483   E – paul@voguefinancial.com.au

Brian Lomas



Arrowstone Wealth

Area of expertise

Holistic advice with specialisation in SMSFs and Estate Planning.

What does success look like?

- Identify what we do that is the same and replicate, so we are not reinventing the wheel
- How do we service clients that can’t afford financial advice

Contact

P – 02 8920 8933   E – blomas@arrowstonewealth.com.au

Representatives in Victoria

Joe Mattar

Red Door Wealth Management

Area of expertise

Holistic advice with a passion for investment management

What does success look like?

- Foster an approachable community
- Leverage specialisations

Contact

P – 03 8456 6797 E – joe@reddoorwealthmanagement.com.au

Meaghan Johns

Yarra Valley Financial

Area of expertise

Holistic advice, specialising in education and ethical investing

What does success look like?

- Madison as a vibrant, diverse and inclusive group of finance professionals serving the community and delivering great outcomes for both clients and businesses.
- Our community as a centre of excellence with a willingness to take on the challenges of change and thrive.

Contact

P – 0492 340 466 E – meaghan@yarravalleyfinancial.com.au

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Representatives in South Australia

Cassandra Sorby-Adams

Wagtail Wealth

Area of expertise

Holistic advice, wealth protection and personal & business risk advice

What does success look like?

1. Continue to build on the strength of the community that is willing to collaborate
2. A more efficient licensee

Contact

P – 0409 316 551 E – cassandra@wagtailwealth.com.au

Craig Muchamore

Don Sampson

i2 Wealth Financial Planning – shared role

Area of expertise

Craig: Portfolio construction; actually identifying clients goals and needs i.e. problem solving
Don: Complex entities and SMSF; portfolio construction

What does success look like?

1. Provide a meaningful sharing of information / insights to Madison executives
2. Forefront of changes to advice profession rather than reactive
3. Build and protect Madison reputation

Contact

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