



## An Introduction....

# The 7 most important things you should know about *Wholistic Financial Coach* Catherine Smith

1. Catherine is an Accountant, Tax Agent, Financial Planner, Finance Broker, Real Estate Agent and Independent Property Advisor but she can be best described as a 'Wholistic Financial Coach'.
2. **Catherine's passion is to assist her clients create wealth and protect wealth for their future and future generations. This passion is displayed through her 'Wholistic' approach to financial advising. Her advice is 'Wholistic' because it covers the *whole* of a client's financial needs and the *whole* of a client's lifecycle.**
3. Catherine has resolved one of the biggest challenges facing clients when they seek financial advice – 'who to turn to?' Catherine realised early in her career that the advice given by Accountants, Financial Planners, Mortgage Brokers and Real Estate agents all differed dramatically and was heavily dependent on where the advisor's commission or payments came from. There were no advisors that covered all aspects of advice and could therefore be 'independent' of commissions. So Catherine qualified, and now advises, in all of the professions.
4. **Catherine's firm is called 'Wholistic Financial Solutions' (WFS) and the clients describe WFS as dynamic, diverse, personalised, knowledgeable and client focused. The firm prides itself in being accessible and responsive. Catherine prefers her clients to get ongoing, accurate and timely advice during the year, whenever it is needed.**
5. In addition, Catherine is a qualified Results Coach and Certified NLP Practitioner. Often her clients need financial advice but they also really need someone to hold their hand and support them as they take the steps they need to take to achieve their financial goals.
6. **Catherine is mother to Jese (13), Harley (11), Khiana (7) and Luann (6). Her eldest two are up and coming sports stars and the younger two are already showing an inclination towards business. Catherine also loves Dragon Boating, paddles for Komodo Paddle club, and is representing Australia in China in 2011.**
7. Catherine is a strong advocate for fairness, honesty and ethics in the financial advising arena and believes in open and transparent fees and charges. Catherine offers the first 'meet and greet' consultation free of charge. With no obligation – you can discuss your situation, goals and needs and determine if WFS is the right advisor for you.



**Catherine is looking forward to giving you the 'Wholistic Financial Coaching' that you need to achieve your financial goals**

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