



Bio for Catherine Smith

B.a.Comm, M.Tax, N.T.A.A, Dip(FP), Dip (MB), Dip (RE) J.P.

Accredited Property Investment Advisor (PIAA)

Recognized Taxation Specialist.

Registered Tax Agent and Public Practicing Accountant

I qualified as an Accountant in 1992. I recall lining up for my degree thinking to myself ‘why did I study Accounting – I would have preferred to do Psychology’. I wanted to be in a professional that involved helping people and didn’t see how crunching numbers fit in with that desire. However, I continued with study in financial areas including a Masters Degree in Taxation, a Diploma of Financial Planning, a Diploma of Finance, a Diploma of Real Estate and a Diploma of Property Advice. During this time I worked for the Australian Taxation Office as an Auditor and Fraud Investigator for 11 years before opening my own practice in 2002.

Despite my skills and qualifications in the financial arenas my interest in Psychology continued and I completed extensive personal development courses including Crossroads I & II, Being Empowered through Service Training (BEST) and Beyond the Edge (BTE). I then went onto complete the Christopher Howard Academy of Wealth & Achievement which was focussed on qualifying to be a Results Coach, NLP practitioner and Presenter. I have now commenced undertaking Beyond Success courses.

Combining all of the above financial and personal development courses together I guess I can be best described as a ‘Wholistic Financial Coach’. My passion is assisting clients create wealth and protect wealth for their future and future generations. This passion is displayed through my ‘Wholistic’ approach to financial advising. My advice is ‘Wholistic’ because it covers the *whole* of a client’s financial needs and the *whole* of a client’s lifecycle. I find my clients often 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.

Working in the financial professional for over 20 years I realised that one of the biggest challenges facing clients when they seek financial advice – ‘who to turn to?’ Advice given by Accountants, Financial Planners, Mortgage Brokers and Real Estate agents all differs dramatically and is heavily dependent on where the advisor’s commission or payments came from. There are no advisors that cover all aspects of advice and are therefore ‘independent’ of commissions. So I qualified, and now advise, in all of the professions.

My 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.

In addition to all of the above, my proudest achievement is my four young children, Jese, Harley, Khiana and Luann and I always ensure that I balance my professional life with time out to spend quality time with them.



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

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