

# Introducing your **Bridges** financial planning team Nowra



## **Nerida Hicks** Financial Planner

Nerida is a financial planner and has worked in the financial services industry since 2001. Nerida holds a Diploma of Financial Planning and is accredited to provide self-managed super fund advice. She is a member of the Association of Financial Advisers.

As an Authorised Representative of Bridges, Nerida is able to assist clients in the area of:

- › Tax-effective investment strategies
- › Superannuation strategies including self-managed superannuation funds
- › Retirement planning
- › Centrelink entitlements
- › Stockbroking
- › Life insurance (life, TPD, trauma, income protection, business expenses)
- › Estate planning.

### **Contact details**

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## **Simon Boom CFP®** Financial Planner

Simon Boom has worked in the financial services industry since 2010 and the financial planning industry since 2011. Simon is a CERTIFIED FINANCIAL PLANNER® professional and holds a Bachelor of Commerce Degree (double major in Finance and Financial Planning) from the University of Wollongong. He is also a member of the Financial Planners Association of Australia.

As an Authorised Representative of Bridges, Simon is able to assist clients in the area of:

- › Tax-effective investment strategies
- › Superannuation strategies
- › Retirement planning
- › Centrelink entitlements
- › Stockbroking
- › Life insurance (life, TPD, trauma, income protection, business expenses)
- › Estate planning.



### **Susan Stubbs** Client Services

Sue joined Bridges Nowra in 2011 and has over 20 years' experience working within the finance industry.

Sue has a strong customer focus and her high organisational skills help streamline the daily functioning of the office. Sue's role includes looking after all existing clients, implementing new clients, Centrelink and client queries.

Sue is originally from Gladstone in Queensland but Nowra has been her home for a larger part of her life. Sue has many interests which include cooking, reading and all kinds of craft.

Sue is a Justice of the Peace and holds an Approved Transaction Authorisation Office (ATO) Authority from Bridges.



### **Kaylene Campbell** Client Services

Kaylene joined Bridges in 2014 and provides a high standard of customer service.

Kaylene is responsible for strategy implementation from beginning to end, share trades, processing of switches, withdrawals, banking and maintaining communication with clients.

Prior to Kaylene joining Bridges, she worked in the retail industry for 28 years processing payroll. She has lived locally for the majority of her life and has two grown boys.

Kaylene is a Justice of the Peace and holds an Approved Transaction Authorisation Office (ATO) Authority from Bridges.



### **Amber McMillan** Client Services

Amber joined Bridges Nowra in 2016 and has become an asset to our team.

She has developed a good rapport with our clients and portrays a strong work ethic to ensure client queries are handled in an efficient and timely manner.

Amber is responsible for strategy implementation from beginning to end, share trades, processing of switches, withdrawals and maintaining communication with clients.

She has lived locally all her life and enjoys spending quality time with her family. Amber holds an Approved Transaction Authorisation Officer (ATO) Authority from Bridges.