



“Financial success is not about taking quick wins, it’s about taking strategic action in order to grow, manage and protect what’s important.”

**Katrina Pulbrook**  
Executive Planner



Katrina is passionate about securing the financial future of her clients. With in excess of 25 years in the financial services sector and extensive experience in private and business banking, she truly knows what it takes to turn her clients dreams into reality and often beyond.

Dedicated to making the difference to each life she touches, Katrina believes that in order to optimise a client’s financial outcome, she needs to leave no stone unturned to ensure each facet of their financial life is maximised. With this belief, Katrina is well-placed to guide clients through this complex financial world in which we live.

“Nothing makes me prouder than to see my clients experience the peace of mind that comes with advice from an experienced financial professional. Along with the lifestyle we create along the way. Creating financial possibilities that they never thought possible.”

Katrina’s personal philosophy is to take clients to new heights with a sustainable financial journey, whilst protecting them and their family.

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### Qualifications

- Superannuation including Self-Managed Superannuation
- Financial Planning
- Investment Advice
- Retirement Planning
- Life and Income Protection Insurance
- Inter-generational Wealth Management
- Strategic Management
- Cashflow and Debt Management
- Business Advisory

### Professional Memberships / Achievements

- Certified Financial Planner
- Diploma of Financial Planning
- Member, Financial Planning Association of Australia

## BOOK YOUR APPOINTMENT TODAY

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Albury | Berwick | Cranbourne | Dandenong | Epping | Frankston | Mornington | Myrtleford | Pakenham | South-Morang | Wangaratta | Werribee

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