

Our Services



Personal Risk Insurance



Business Succession Planning



Superannuation & Investment



Estate Planning



Transition to Retirement



Retirement Planning

Since 2012, McLardy McShane Financial Services has been providing thousands of Australians with accessible, reliable, and custom-fit wealth protection, superannuation, retirement and estate planning advice.

At the helm is Managing Director, Amanda Freeman. An esteemed industry operator of 20+ years, Amanda leads a highly qualified, passionate, and customer-centric team whose primary motivation is to make wealth protection, superannuation, and retirement planning advice accessible to all Australians.



**WE'VE
GOT
YOUR
BACK**

OUR TEAM: ADVISORY**Amanda Freeman**

Amanda's expertise covers the full scope of wealth accumulation advice, with specialist skills in Personal Risk Insurance and Business Succession Planning. [Click here for Amanda's bio.](#)

**Mark Gibson**

Mark is a financial expert with a rare depth of industry experience, helping individuals, families, & small businesses to achieve long-term financial security. [Click here for Mark's bio.](#)

Ours is a happy, collaborative working environment where our employees can be themselves, and thrive doing what they do best.

**Gavin Thomson**

Gavin is an experienced, financial adviser, with specialist expertise in Retirement Planning, Investments, Superannuation and Estate Planning. [Click here for Gavin's bio.](#)

**John Adas**

John brings extensive industry experience to the team, including an impressive track record in Personal Risk Insurance and Business Succession Planning. [Click here for John's bio.](#)

**OUR TEAM: SUPPORT****Belinda Hawkins**

Belinda has decades of experience in corporate financial services, and is an experienced and knowledgeable Paraplanner. [Click here for Belinda's bio.](#)

**Deb Dunstall**

Deb's career in client service brings outstanding operational efficiency to the team. Her technical prowess keeps the back-office running smoothly. [Click here for Deb's bio.](#)



The Work

Engaging a financial adviser can be intimidating. Many Australians think it's either too complex, too time-consuming, or simply out of their financial means. That's why Amanda and her team meticulously uncover every individual's unique challenges and goals with a straightforward approach, without confusing industry jargon, with compassion and a personalised style.

And they deliver the right wealth management solutions to help you achieve lifelong financial confidence....

...Confidence in your financial situation today. And confidence in your future.

The McLardy McShane team are ready to work with you to:

- ▶ **Invest, grow, and protect your wealth**
- ▶ **Establish financial protection for your small business**
- ▶ **Better manage and optimise your cashflow**
- ▶ **Provide decades of knowledge and insight to help you understand the value of financial discipline and planning, at every stage of life**
- ▶ **Plan, manage, and optimise your super from an early stage**
- ▶ **Assess your appetite for risk to help you work towards your financial dreams**

Our Mission

We believe that by understanding the moments in life that matter to you the most, we can create a financial plan that lets you get on with enjoying life. Knowing your wealth is protected gives you financial confidence in your future.

We take the time to understand your needs and financial goals, and develop a plan that's right for you.

Our Culture

Like the McLardy McShane Group, McLardy McShane Financial Services is driven by a 'people before profits' culture.

Our people operate by the principles of respect, compassion and the delivery of timely service and solutions, always in the best interest of the individual client. We respect each other, our referral partners, and the unique situations of each and every client.

Ours is a happy, collaborative working environment where our employees can be themselves, and thrive doing what they do best.

Philanthropy

Across the entire McLardy McShane Group, there is a shared ethos of giving back to local communities.

We are major supporters of the [Reach Foundation](#), helping young Australians. This has included Don McLardy's position as Chair of the Foundation, and Mike McShane's board position (which he holds to this day).

Amanda Freeman has also been integral to the development of the [Reach Foundation](#) from its inception in 1994. Through paid and volunteer work Amanda's ongoing support and involvement with the foundation continues today.

And, the McLardy McShane Group has participated in all [Daniher's Drive](#) car tours, since its inception, raising money and awareness for Motor Neurone Disease.

Overall, our philanthropic efforts have raised over \$2.6m in support of the following charities:

- ▶ [The Reach Foundation](#)
- ▶ [Boys to the Bush](#)
- ▶ [Fight MND](#)
- ▶ [Beyond Blue](#)
- ▶ [Love Your Sister](#) and the [Sam's 1,000 initiative](#)
- ▶ [EB Research Partnership Australia](#)

And finally, we are excited to announce a new partnership with the [Manningham United Blues Football Club](#) (soccer) with a particular focus on the Senior Women's Team. Both the McLardy McShane Group and Financial Services teams are proud to support Manningham United for the next two years!



Our promise is to understand each client's needs and goals, no matter how large or small, and build a plan that makes it simple for them to reduce their financial risks and work towards their lifestyle dreams

Are You Ready to Secure Your Wealth?

 (03) 9290 9200 or 1300 032 086

 support@mclardymcshane.com.au

 mclardymcshanefinancialservices.com.au

The content on this brochure is of a general nature and does not constitute advice to any individual. You should seek individual and specific advice before making any financial decision based on information contained here. Failure to seek advice may lead to financial decisions and consequences that are not appropriate to your needs and circumstances and financial loss may be incurred. McLardy McShane Financial Services Pty Ltd ACN 130 344 768 is a Corporate Authorised Representative (No: 325088) of Integrity Financial Planners Pty Ltd Australian Financial Services License 225051 ACN 069 537 855 Ph: 03 9723 0522

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