

Belinda Hawkins Paraplanner

The Heart of the Operation

Belinda is a practised industry professional and operates at the heart of McLardy McShane Financial Services. With expertise across banking, corporate finance and financial services, Belinda brings more than two decades of industry experience and insight.

As Paraplanner, Belinda provides crucial support to McLardy McShane's financial advisors, across both client management and operations.

With an expert guiding hand across all facets of the business, Belinda allows the McLardy McShane financial advisors to focus on what they do best: enable clients to achieve their life's financial objectives.



Belinda's industry background gives her a level of knowledge and expertise, beyond that of a typical paraplanner.

Expertise

Belinda's competency and degree of responsibility goes way beyond that of a typical Paraplanner. This includes:

- Undertaking superannuation and insurance research for clients
- Analytical expertise for both internal and external reporting
- An exceptional knowledge of managing, interpreting, and completing financial documentation including ROA's, investment reviews, compliance documentation and portfolio reports
- A deep understanding of the financial services industry covering compliance standards, superannuation, and investment management
- Excellent client relationship management skills

And crucially, Belinda is the primary go-to for efficient business operations at McLardy McShane Financial Services; making sure everything is compliant, up to date, on time and smooth sailing.

A Relationship Focus

Belinda is a people person. Friendly, outgoing, and attuned to the nuances of successful relationship management, her ability to maintain long-term relationships in the financial services sector has been proven time and time again.

This relationship focus, coupled with a keen eye for industry knowledge – be that research, legislative change, or new financial products – allows the McLardy McShane team and client base to consistently have access to reliable market intelligence.

Belinda has been married to Bruce for 21 years. They have two teenage kids, Cameron and Tiffany, and an adorable white Labradoodle, Jasmine (aka Jaz).



With expertise in banking, corporate finance and financial services, Belinda brings more than two decades of industry prowess and insight

Qualifications

- Bachelor of Arts (BA), Economics major, Geography major, Psychology minor (Melbourne University)
- Post Graduate Diploma in Economics (Preliminary Masters) (Melbourne University)
- Graduate Diploma in Applied Finance and Investment (Securities Institute of Australia)
- Diploma of Financial Planning (Pinnacle Financial Services)

Recognition

- **Customer Recognition:** Throughout her career Belinda has achieved high satisfaction ratings and client retention via effective communication, project management skills and helping clients meet their financial goals
- **Relationship Success:** Belinda has used her relationship prowess to boost business growth, for the mutual benefit of her clients and her team
- **Business Development:** Preparation and submission of multiple successful tenders across various corners of the financial services industry

I get enormous satisfaction from helping people, and seeing our team assist clients to solve their financial problems. Everyone in this business has our client's best interests at heart. Always.

Confidence in your future



Belinda Hawkins, Paraplanner
McLardy McShane Financial Services



(03) 9290 9200 or 1300 032 086



belindah@mclardymcshane.com.au



mclardymcshanefinancialservices.com.au

**WE'VE
GOT
YOUR
BACK**