



Joanne Monteleone
Client Services

Joanne works with Unified Financial Services Advisers to implement and assist in preparing our clients Financial and Lifestyle Plans.

Joanne is able to assist you with:-

- Queries in relation to paperwork,
- Obtaining further information about your investments,
- Assisting with fund manager administration queries, and
- Relaying your financial planning advice queries to your advisor.

Joanne has 4 years of experience in the financial planning industry. Having previously worked in both a boutique firm and a larger firm, Joanne joined Unified Financial Services as she prefers our boutique approach which offers a comprehensive service and focuses on strategic advice.

Joanne holds a Diploma of Financial Planning, and is currently pursuing an Advanced Diploma of Financial Planning.

Joanne, being passionate about Financial Planning, truly believes in building relationships for the long term by providing quality information tailored to individual needs. Joanne works closely alongside the Advisers, assisting with the implementation of financial advice in order to deliver a high level of personalised service to our clients.

She looks forward to achieving her long term career goal of becoming a Financial Planner.

In her spare time, Joanne likes walking her dogs Luey and Noo-Noo and attending vintage car shows with her 1968 Rally Sport Camaro.