



**Lisa Haley**  
**Certified Financial Planner™**  
**Representative of**  
**Unified Financial Services Pty Ltd**

Lisa Haley has worked with Unified Financial Services for over 8 years. Lisa is a Certified Financial Planner™ (CFP), which is the highest qualification of the financial planning industry. Lisa's passion is coaching clients to achieve financial freedom.

Together with her CFP accreditation, Lisa's qualifications also include a Diploma of Financial Planning, B. App Science and a Grd. Cert. in Accounting, along with a Self Managed Superannuation Fund (SMSF) accreditation through Financial Essentials.

Lisa's primary role is providing strategic advice for clients. Lisa uses her attention to detail and technical skills in keeping up-to-date with the changing legislative environment for the Firm. She loves to get her teeth into comprehensive plan writing (Statements of Advice - SOAs).

A secondary role is investment advice. As Unified Financial Services is not linked to any banks or institutions, Advisers have access to a wider variety of funds on our Approved Product List. As many of our clients hold Industry Super Funds our Firm is able to provide objective advice on a fee for service basis.

Lisa specialises in advising clients in relation to: -

- Transition to Retirement strategies (TTR),
- Self Managed Superannuation Fund (SMSF) strategic advice in relation to investment planning and estate planning,
- Defined Superannuation Funds – Health Super, UniSuper, GSO, CSS, PSS,
- Financial independence for Women,
- Working with young families to put in place a Financial Plan,
- Maximising cashflow,
- Margin Lending for under 45 year olds,
- Wealth accumulation and tax planning strategies for professional couples,
- Structuring Aged Care,
- Ethical / Socially Responsible investing.

Lisa is also committed to financial literacy for the public, undertaking seminars and workshops for workplaces, hospitals and the general public. She has a passion for enabling people to gain general education prior to seeking personalised advice.

Lisa is fitness obsessed, working out most days in fitness classes. Her previous work in cardiac rehabilitation and the fitness industry aligns well with financial coaching, where whole of life fitness is our passion and purpose.

In addition Lisa is Treasurer for a local branch of Soroptimist International, which is a women's service group with over 120,000 members worldwide working for women and children. To learn more visit [www.siswp.org](http://www.siswp.org).