

Caroline Bell

PRINCIPAL AND REPRESENTATIVE

phone (03) 8621 0600

fax (03) 8621 0699

mob 0402 356 372

caroline@summerhillfs.com.au

Education

Bachelor of Commerce (University of Melbourne)
Diploma of Financial Planning
Financial Planning Certificate (UK)
Certified Financial Planner
LRS® Life Risk Specialist
ASX Accredited Listed Product Adviser

Professional Memberships

Financial Planning Association

Experience

Caroline joined Arthur Andersen in 1993 within the Tax Division and provided financial and tax advice to individuals and expatriates, both in Melbourne and London.

During her career at Arthur Andersen, Caroline provided tax, financial strategy and investment advice to individuals and their associated entities, as well as expatriate tax advice until leaving in 2001. During this time, Caroline specialised in providing superannuation and retirement advice.

In 2001, Caroline joined Pitcher Partners in Melbourne as a Senior Manager/Adviser in their Investment Advisory Team. In this role, Caroline was responsible for providing investment and financial advice to a range of clients including clients accumulating wealth, as well as high net worth individuals.

Caroline joined Australian Private Capital, a small boutique financial planning firm, in October 2003, where she continued providing financial strategy and investment advice to a variety of clients.

In 2006 Caroline established Summerhill Financial Services to provide a personalised financial strategy advice service. In particular, Caroline provides advice for people with a focus on building and accumulating wealth.

Areas of Expertise

Caroline specialises in providing advice in the following areas:

Wealth-accumulation strategies
Superannuation and retirement planning
Tax planning with regard to financial strategy



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FINANCIAL SERVICES