



Welcome to Sydney West Financial Services

www.swfs.net.au



A Snapshot of SWFS

We are a boutique firm established in 2008 and since then have assisted people to reach their personal financial goals by providing ongoing advice.

Our team brings diverse financial experience to support you with personalised strategy to achieve your goals.

Services we offer



Retirement may seem a long way off but putting money into super now is still a tax effective way to invest your money.

Superannuation is a way to save for your retirement. You build up super while you are working to make sure you can have a comfortable retirement



Superannuation



Insurance is the foundation of all financial plans. We can help you evaluate the risks and come up with the right insurance solution for you and your family.

Estate Planning ensures your assets are distributed to the right people at the right time.



Estate Planning



Effective **Debt Management** is investing in the right type of assets, the interest you pay and prioritizing your debts.

An **SMSF** is one where you, as a trustee and member, have responsibility over the management, investment and administration of your super fund.



Why Partner With SWFS

Our Vision is to Secure a phenomenal tomorrow by collaborating to initiate your life decisions today.

“We create our tomorrow by what we dream today”

We are a growing team where each diverse individual is respected and provided amazing opportunities to learn and grow. Our Values are

Taking Ownership
In Everything

Integrity
In Conduct

Trust
Build Through Actions

Team Work
Through Open Communication

Passion
Our Reason To Be Here



Business Overview 2021



\$ 530 Mn

Fund under Management



5000+

Clients Base



200 Yrs+

Team Experience in
Financial Industry



16

Diverse Team Members

3 Offices

In Sydney Area

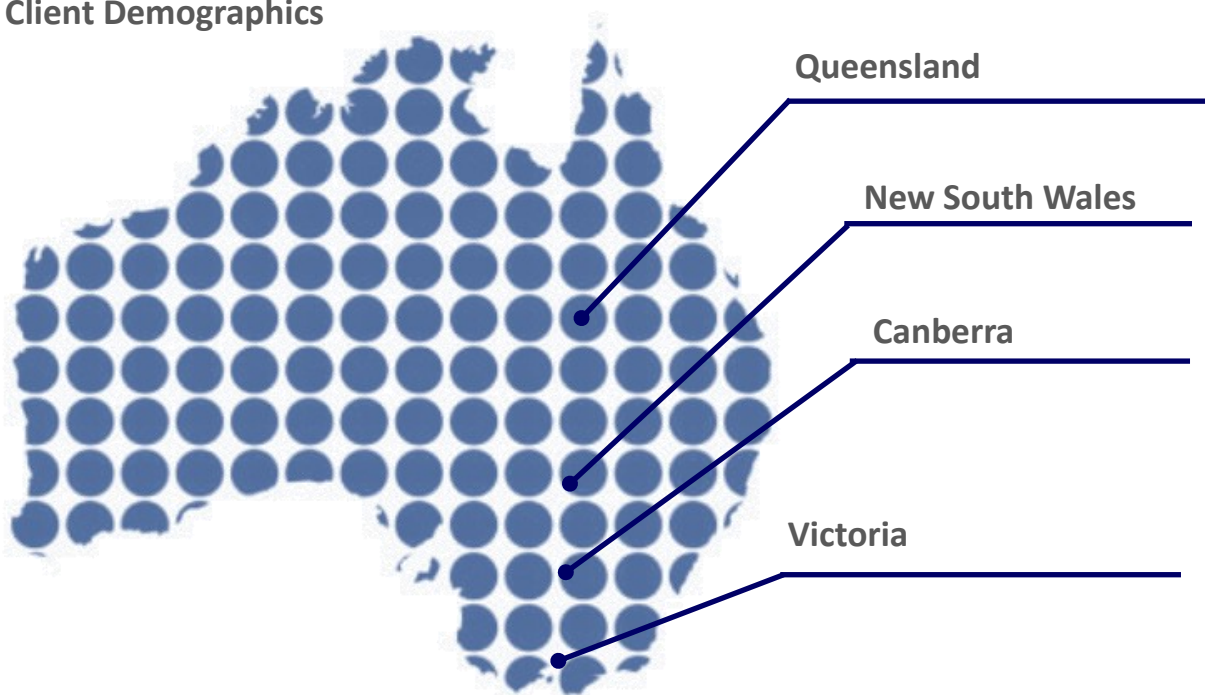
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Financial Planners

13

Years of operation

Client Demographics



Meet The Team



Shitij Mann

Director
Financial Planner / Mortgage Broker



Sukriti Mann

Head HR & Accounts



Khyati Asher

Head of Compliance



Kelly Cotton

Team Lead Client Service



Matthew Tame

Team Lead Financial Planner



Jay Chowdhury

Senior Para Planner



Linda Kim

Planner Support



Stephanie Middlebrook

Financial Planner



Jyoti Prasai

Financial Planner

Meet The Team



Angela Woo

Financial Planner



Edward Mendigorin

Financial Planner



Lucia Quiroz

Planner Support



Glenda Oldham

Mortgage & Client Support



Katy Qi

Para Planner



Barbara Rees

Planner Support



Divya Sachdeva

Admin & Client Support

Our Approach - “Financial Guidance Process”



Connect: Our Financial Planners will meet and understand your goals and objectives.



Research: Based on information our experts will research for the best plans which can help you achieve the goals at the earliest.



Unique Plan: This is heart of our process, where our planners create focused plan for your goals



Plan Consultation: Our financial planners meet you, and take you in detail through the plan, and further advice you.



Implementation: Based on your authorization, your financial planner will implement your financial strategy.



Ongoing Contact: You may get in touch anytime, however we will keep regular review meetings to share the update on your goals.

Customer Voice by “The Beddoes”



*Score out of 10. Based on independent research conducted by The Beddoes Institute in August 2018

**www.mosttrustedadvisers.com



Our Platform Partners

Wealth



Mortgage



Insurance



Asset
Consultants





Reach us at



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Office Hours

9am – 5pm Monday – Friday

Bella Vista

Building B, Office 119,
20 Lexington Drive,
Bella Vista NSW 2153

Chatswood

821 Pacific Highway,
Chatswood, NSW 2067

Katoomba

180 Katoomba Street,
Katoomba,
NSW 2780

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