

Adviser Profile:

Tanya Oddo

BA-BCom | DFP | AR. No 284500



Since Tanya completed her double degree in 1998, she has worked in the financial services industry. Through various roles early in her career, she accumulated a wealth of experience but her talents and passion for all things technical led her to the specialized role of Paraplanner. Her hard work and dedication was recognised in 2006 when she was awarded the NSW Paraplanner of the Year. What drove her, was building a personal strategy for each client, using all their resources to map the best way forward.

As happens when you work hard in a chosen field, her knowledge quickly outgrew the role and she expanded her skill set to client-facing financial adviser, culminating in starting her own company, Steps Financial, in 2013.

Tanya's analytical mind means that she can see through figures and chaos, right to the heart of matters, deciphering and simplifying as she goes. She can then relate this back to clients in an easy-to-follow and implement financial plan, where she guides them along every step.

She has a passion for assisting clients with cashflow strategies and developing their money plan and has been a guest on ABC Radio's Nightlife program to discuss family cash flow planning and the importance of money strategies for women.

Tanya holds the following qualifications & accreditations:

Diploma of Financial Planning (DFP)

Double Bachelors' Degree in Arts & Commerce from Wollongong University

Recognised as a qualified tax relevant provider under the Better Advice Act 2021.

Member of the professional body Financial Advice Association of Australia (FAAA).

FASEA Exam - May 2021

Adviser Profile:

Antoinette Mullins

GradDipFinPlan | CFP | ADFS (FP) | B. Diac

AR No.316376



With a background in youth work and trauma counselling, Antoinette brings a different skillset to her role as financial adviser. This has enabled her to provide emotional support to clients going through a difficult time, as well as financial advice to improve their situation. She has a passion for improving the financial literacy of her clients so that they not only understand their financial plan, but also get actively involved in implementing it.

As a Certified Financial Planner® with 18 years' experience, she enjoys working with a range of clients from those with complex structures to pre-retirees wanting a clear retirement plan.

Specialising in providing advice to professional women, Antoinette is a seasoned presenter at seminars and boardroom lunches and her mainstream media appearances include Sky News Business and Channel 9's The Today Show.

She enjoys writing articles aimed at spreading awareness of, and confidence in, managing your own money and contributes regularly to various publications including The Financial Standard, Money and Life Magazine and The New Daily.

Antoinette holds the following qualifications & accreditations:

Graduate Diploma of Financial Planning

Certified Financial Planner (CFP®)

Advanced Diploma of Financial Services (Financial Planning)

Recognised as a qualified tax relevant provider under the Better Advice Act 2021.

Member of the professional body Financial Advice Association of Australia (FAAA)

Bachelors' Degree in Youthwork from UNISA

Certificate in Crisis Debriefing and Trauma Counselling - UNISA

Certificate IV in Finance & Mortgage Broking

FASEA Exam - September 2019