



Triona Thompson

FINANCIAL PLANNER

AREAS OF ADVICE

- Cashflow
- Debt Management
- Superannuation
- Tax Minimisation
- Investments
- Life Insurance
- Retirement Planning
- Centrelink
- Estate Planning

QUALIFICATIONS

- Graduate Diploma Financial Planning
- Fellow Chartered Financial Practitioner
- Advanced Diploma Financial Planning
- SMSF Accreditation
- ALPA Accreditation

CONTACTS

E : triona@eyrefinancialservices.com.au
P: (08) 8682 4173
W: eyrefinancialservices.com.au
A: 100 Tasman Terrace
Port Lincoln SA 5606

FINANCIAL PLANNING

Triona's passion for Financial Planning comes from a love of helping and educating people to enjoy life to the fullest and make the most of every situation.

Her approach is to work with her clients to assist them to make well informed decisions about their financial situation. She works diligently to provide detailed and well researched recommendations that will lead to the best possible outcome for her clients.

Financial Planning covers all areas of your financial situation. Providing comprehensive advice ensures any strategy has considered your overall position, now and in the future.

Triona will assist you to understand your current position, know where you want to be and provide you with strategic recommendations to ensure you get there. Without good planning you may never achieve the lifestyle you desire.

CAREER OVERVIEW

Triona has been working in the finance industry for over twenty years, originally with the Commonwealth Bank then in Accounting support and Self Managed Super Funds before studying and working in Financial Planning. It was a serendipitous start to a career that is now a passion. Triona completed her extensive studies with Deakin University and is fully qualified under the new obligations for the Financial Advice industry.

Her past work life experience boasts time in the Australian Army, Interior Design and Hospitality, having reached leadership in all roles.

Triona has worked as an Authorised Financial Representative since 2013 providing advice to clients all over Eyre Peninsula and Australia wide.

PERSONALLY

In her spare time Triona loves spending time with her family, her husband, Glenn, and children Annie, Kara, Tom, Jessica, Brooke and Granddaughter, Rosie. Priorities for this family include sport, outdoor adventures, and making fun in every situation.

In her down time Triona enjoys cooking, reading, gardening, running, camping and being in nature.

She has an appreciation for all things good in the world; protection, conservation and preservation of the natural environment and humanity. She loves to travel and one day dreams of working in Sea Turtle conservation.