



**5 MINUTES WITH
PRINCIPAL
SPONSOR -
GEOFF WALLEY**



1. Why did you decide to sponsor the Samuel Gilbert Public School Great Fete?

As part of the North West community we like to participate in local events, and having attended personally last year we had a great time as a family.

2. How did you become the Principal of Yellow Brick Road Baulkham Hills?

I have been Principal of Yellow Brick Road Baulkham Hills for 6 years. I heard Mark's vision for the business and shared his passion. Yellow Brick Road is a true non-aligned financial planning brand, so as an owner I am able to offer solutions, not products, for the local community.

3. Tell us about the typical day of a YBR Baulkham Hills Financial Planner.

With all the changes to the superannuation environment and low interest rates, a typical day has us assisting clients with important investment decisions, and helping create a plan to generate the required assets that will create a client's desired income in the long term.

4. Financial planning and budgeting are important factors to every family, but can be scary and time consuming. What are your top 3 tips to any family tackling their finances?

- Never put off planning. I see too many people who are now putting off their retirement and continuing to work because they did not tackle their finances early.
- Budgeting is boring but essential. You need to take control of your money, or it will control you.
- Make sure you insure your income. Without adequate insurance you leave your family exposed.

5. What does an ideal client look like for YBR Baulkham Hills?

Someone who is busy with their lifestyle and needs assistance to plan and manage their finances be it budgeting, mortgages, super, investments or insurance.

6. **What is the biggest achievement of the YBR Baulkham Hills office in the past 12 months?**

The world has been a scary place in the last 12 months. We feel that we have educated our clients well during this period, kept everyone on track, and helped block out all the 'noise'. This is evidenced by our retention record, no client has left our practice during this period. This is because we follow through with on-going service promises.

7. **What are you most looking forward to on The Great Fete day, Sunday 21 August?**

Meeting the local community and getting stuck into a sausage sandwich.