



# Our Advisers



**David French**  
Managing Director  
Rockhampton

David has 25 years' experience in finance and economics, 20 of which were in investment markets. David has been responsible for building the CIPL group. He holds a Bachelor of Economics and a Diploma in Corporate Management. David is treasurer of Home Support Association and a past director of Rockhampton Regional Development Limited and the Rockhampton Chamber of Commerce.



**Robert Syben**  
Head of Financial Planning  
Melbourne

Robert has a passion for people, and is passionate about helping them meet their financial goals. Prior to coming to financial planning Robert had many years working in investment management, merchant banks and fund management. He's tertiary qualified (in economics), and is a certified financial planners designation.



**Sue Dunne**  
Senior Financial Adviser  
Rockhampton

Sue holds an Advanced Diploma of Financial Services (Financial Planning) and has undertaken further study to specialise in financial and technical analysis and superannuation. Having worked in small business for over 25 years Sue's business acumen combined with financial planning skills, make her a valuable asset to our team.



**Chris Heyworth**  
Senior Financial Adviser  
Melbourne

Chris is a member of the Institute of Chartered Accountants in England and Wales and a certified financial planner. He has more than 25 years' experience providing personal financial planning and investment advice, and has a particular interest in helping with family wealth management including estate planning.



**Dean Tipping**  
Financial Adviser  
Rockhampton

Dean has a wealth of knowledge and experience having worked as an accountant for many years. Dean holds a Bachelor of Business as well as qualifications in financial planning and is a certified practicing accountant.

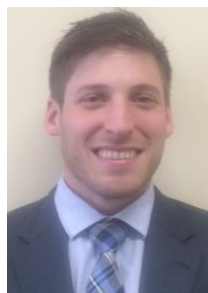


## Stephen Coniglione

Financial Adviser

Melbourne

Stephen is a dedicated professional with a Bachelor of Business (Accounting), Diploma of Financial Planning and has an Advanced Diploma of Financial Planning. Specialising in investments, Stephen knows the importance of the right strategy, investment advice and high quality service necessary for clients to reach their needs and objectives.



## Josh Scipione

Financial Adviser

Melbourne

Josh joined the company in mid-2011 whilst he finished his studies. Following the completion of a Bachelor of Commerce, he has progressed through several roles within the organisation including, Client Services Team Manager and Para-planning. In November 2014, Josh was appointed a financial adviser where he continues to assist clients achieve their desired lifestyle through strategic financial management.



## Mark Buisman

Senior Financial

Adviser/Mortgage Broker

Melbourne

Mark is an experienced financial adviser who previously worked within the Banking and Finance Sector. Mark is tertiary qualified (in finance and accounting), has a Certificate IV in mortgage broking and is a certified financial adviser. He has a particular interest in estate planning, superannuation and mortgage broking.



## Scott Plunkett

Risk Adviser/Mortgage Broker

Melbourne

Scott has been in financial services since July 1992. Scott has worked in accountancy aligned advisory groups, and Commonwealth Financial Planning in the Business and Premium Banking division, as a Business Financial Planner for 5 years. He specialises in personal/business risk advice, superannuation and mortgage broking. He has completed an Advanced Diploma of Financial Planning.



## Morgen Harris

Senior Risk Adviser

Melbourne

Morgen joined us in 2006 after the completion of a Bachelor of Business and Diploma of Financial Planning. She is experienced in providing specialist advice taking into consideration appropriate taxation of premiums and proceeds, suitable policy ownership and complex health scenarios. She provides advice in both the personal and business protection space, including business succession planning.



## Amy Gill

Risk Adviser

Melbourne

Amy Gill has firsthand experience in client/technical services, along with processes including Centrelink, portfolio administration, and product and needs analysis. Amy specializes in risk insurance after developing an interest during her Diploma of Financial Planning. She acknowledged the need for risk advice in order for her clients to reach their financial goals.

	<b>Melbourne</b>	<b>Rockhampton</b>
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<b>Web</b>	www.capinvest.com.au	

## Capricorn Investment Partners

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This document forms part of the Financial Services Guide  
Effective 16<sup>th</sup> October 2015



the Pentad Group



CAPRICORN  
INVESTMENT  
PARTNERS



the Pentad Group

# Our Team

## Administration



**Selena  
Smith**  
Reception/  
Admin Support  
Officer



**Michelle Su**  
Reception/  
Admin Support  
Officer



**Dylan Tyler**  
Reception/  
Admin Support  
Officer

## Client Services



**Rose  
Sladden**  
Client Services  
Manager



**Sharon  
Pollock**  
Manager -  
Client Services  
and  
Paraplanning



**Tracey  
Briggs**  
Client Services  
Officer

## Bookkeeping



**Christine  
King**  
Bookkeeper



**Sandra  
French**  
Bookkeeper



**Louise  
Bidenko**  
Bookkeeper/  
Business  
Support  
Manager



**Cheryl-Ann  
Walton**  
Bookkeeper



**Kailan  
Augustine**  
Bookkeeper

## Portfolio Administration & Paraplanning



**Katrina  
Tearle**  
CHES  
Administrator



**Natasha  
Kuhl**  
Portfolio  
Administrator

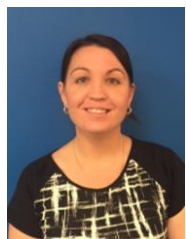


**Ken Khoo**  
Senior  
Paraplanner

## Investments & Business Consulting



**Ian  
Maloney**  
Manager -  
Share Trading



**Jodie  
Stewart**  
Share Trading  
Officer



**Lachlan  
McKenzie-  
McHarg**  
Adviser Equities  
Dealing & Research



**Chris  
Goodman**  
Assistant  
Financial  
Planner



**Pardis  
Hudson**  
Assistant  
Financial  
Planner



**Jake Brown**  
Business  
Consultant

## Compliance, IT & Data



**Davina  
Knight**  
Compliance  
Manager



**Bronwyn  
Nunn**  
Compliance  
Support  
Officer



**Adrian Cahill**  
Consultant/  
Analyst



**Ming Hou**  
IT Manager



**Boden  
Abell**  
Undergraduate  
Trainee



**Caitlin Toohey**  
Marketing/  
Social Media  
Officer

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