



Henderson Matusch  
PROVIDING FINANCIAL FREEDOM



# Simone Richardson

**Current Role:**  
**Senior Financial Adviser**

---

## **When did you start with HM**

April 2004

## **Why did you choose to work in the Financial Services sector**

I am passionate about helping people and driven by being able to have a positive impact on people's lives. Financial Planning provides me with a vehicle to empower people through coaching, education, and advice. It's extremely rewarding and I feel very privileged to partner with so many clients in achieving their hopes and dreams.

## **Describe your career progression**

Leaving Uni, I worked in sales and marketing roles, in my mid 20's I returned to Uni to complete a graduate diploma in teaching. During this time, to "help" my mother out in her financial services practice I agreed to assist with client service functions. Prior to this point, I had thought financial planning was about money, but it was this exposure where I very quickly learnt it was about people. It was about coaching, educating and advice so they could have money to achieve their goals. Needless to say, I switched careers, dropped teaching and started studying my Diploma of Financial Planning.

Starting out in paraplanning, I obtained my proper authority in 1999, whereupon I started conducting client meetings. Initially superannuation and insurance orientated, I quickly progressed to more complex financial plans including wealth creation and retirement planning.



Henderson Matusch  
PROVIDING FINANCIAL FREEDOM

In 2004, given the sale of my mother's practice, I was looking for a new home. With several interviews and offers, it was the passion to make an impact on people's lives, the partnership style of advice, internal culture and client centric service offering that excited me in joining Henderson Matusch, and I haven't looked back since.

Starting in our Southport branch in 2004 as a Financial Adviser, I have progressed over the years to become a Senior Financial Adviser. As our client base has grown I now not only coach and educate clients but also head up our team of 7, coaching and mentoring and developing their skills to be able to help more people and create a lasting legacy.

### **What do you find as the most rewarding part of your role**

It's all about people and the positive impact I can contribute to improving someone's life. It is so rewarding to have the privilege of partnering with people on life's journey to provide reassurance, peace of mind, education, coaching, and advice to help them achieve their life goals.

### **What training & development has HM assisted you with**

Completing my last subject of the Advanced Diploma of Financial Planning with HM, I have also obtained my qualification as Commissioner of Declarations, Margin Lending qualification, Diploma of Finance – Mortgage Broking. In addition to these technical qualifications I love that HM focuses on personal development and I've really benefited from exposure to Ian Stephens (business coach), DISC and 5 Behaviours which have enhanced my communication and interpersonal skills, and that of the business as a whole. Conferences each year with amazing guest speakers and thought changers have also been a highlight.

### **Why do you like working with HM**

Our culture, team and united passion to have a positive impact on people lives. I love what I do and feel very fortunate to be part of HM.

### **What advice would you give someone who would like to start a career in Financial Services**

If seeking to make a positive difference in people's lives, the Financial Services Industry is definitely for you. An ever changing industry, you'll learn to embrace change as opportunity, you will grow and develop with skills and experience and be rewarded by the lives you impact and the partnerships you form.



Henderson Matusch  
PROVIDING FINANCIAL FREEDOM

**Footnote:**

Here at HM we are also proud to announce that Simone Richardson was a finalist for the Financial Adviser/Financial Planner of the year award in the 2017 Women in Finance Awards. The Women in Finance Awards is an exciting program that identifies the leading women across financial services, from business leaders and mentors, to skilled investment managers, to client-centric accountants, financial advisers and mortgage brokers. They represent inspirational high achievers from the financial sector, from today's thought leaders to the stars of tomorrow.

