

INVITATION

18<sup>th</sup> MAS  
Annual  
Client Awards

On the 1<sup>st</sup> of November, 136 clients and staff once again converged on the Board Room at the Gold Coast Turf Club for the 18<sup>th</sup> Annual Client Awards.

Thank you to all of you who joined us on the day and made it such a success. We value these annual events as it is a chance for you all to get to know our staff better and to catch up in an informal and relaxed setting and to celebrate the success of those who have achieved their Wealth Steps. Unfortunately not all awards recipients could attend on the day but we were able to celebrate with the following:

Dennis & Noela Fry received the 2<sup>nd</sup> Generation Award. This award is for introducing their children to our services.



**Wealth Step 1** - Private Debt Elimination was awarded to Pat & Gwenda Sullivan



**Wealth Step 2** – Debt Parity was awarded to Laz & Taflyn Fiola and Frank & Debbie Vella



**Wealth Step 3** - Financial Independence was awarded to John & Sandra Birch, Harry & Ann Fisher, Michael & Wendy Greening and.....



**Wealth Step 3** - Geoff & Liz Griffin & Pat & Marilyn Walsh.



During the day, tables were given money to bet on 4 races to try and win money for us to donate to a charity. Finally we have made a profit with 7 out of 15 tables in the black. A good overall return with \$1200 invested giving us a \$1537 or 29.75% return, but high risk as more than half the tables lost between 6 and 100%.

It was nearly a photo finish with only \$1 separating the top 2 teams. Table 13 took out the final honours.



future2

the Foundation of the Australian  
Financial Planning Association

Welcome to Future2

Financial planners giving back to the communities  
from which they draw their livelihoods

Our chosen charity was future2. future2 exists to make a lasting difference in the lives of those who need it most. Through grants to community, not-for-profits and charities, the Future2 Foundation supports young Australians who are financially and socially disadvantaged, helping them to lead productive, fulfilling lives in the community.

A Big thank you to Jan & Cheryl Sterkenberg who also donated \$50 of their own funds.

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We dressed to impress as you can see in the photo pages following which made the judging of “Fashions on the Field” extremely difficult.

Michele Joosep wowed the judges in her beautiful cream lace cocktail dress, pink floral stilettoes and matching hot pink fascinator to win the “Best Dressed Female”.



Simon Foat took out the “Best Dressed Male” in his pin stripe red and white shirt with complimentary red tie.

After stepping off a cruise boat in Brisbane that morning one of our Melbourne couples Emma and Leigh Nitz took out the “Best Dressed Couple” award.

“Best Headpiece” this year went to Tracey Tucker.



Congratulations to our winners and also to everyone else who “Dressed to Impress.”



Thank you again to all of you who joined us on the day and made it such a success. We look forward to seeing more of you at next year's function.

Kind Regards,

Eric McCay, Rob Dugdale,  
and the Team





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# CLIENT AWARDS

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# CLIENT REFERRALS

Phil & Heather Briggs  
Pru Haldane  
Bill & Vikki Hirst

# 2<sup>nd</sup> GENERATION

Dennis & Noela Fry



# WEALTH STEP 1

## Private Debt Elimination

Robert & Michelle Freedman

Wolf & Deb Schinnerer

Pat & Gwenda Sullivan



# WEALTH STEP 2

## Debt Parity

Laz & Taflyn Fiola

Craig James & Nicci Schumacher

Rick & Dot Litherland, Simon & Julie Proctor

Frank & Debbie Vella



# WEALTH STEP 3

## Retirement Objective

John & Sandra Birch, Harry & Ann Fisher

Michael & Wendy Greening, Geoff & Liz Griffin

Maree Le Fevre, Mo & Robyn Meppem

Pat & Merilyn Walsh



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# FUND MANAGERS OF THE YEAR

Table No 13



# BEST DRESSED FEMALE



Michele Joosep

# BEST DRESSED MALE

Simon Foat



# BEST DRESSED COUPLE

Leigh & Emma Nitz



# BEST HEAD PIECE

Tracey Tucker





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