SYDNEY FINANCIAL PLANNING
est. 1988
advice that stands the test of time

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"Having the drive to succeed is a powerful quality.
If you pair this with a right focus and an action plan the results can be quite amazing.

My aim is to guide and manage client's behaviour by providing clear direction to achieve results."

Michal Bodi

Senior Financial Planner | Partner

UNIQUE QUALITIES

Working with people who seek simple and elegant lives with a purpose
Investor behaviour counselling
Expertise to help executives plan their transition to retirement
Guidance after divorce and financial settlement
Retirement planning and preserving family wealth
Turning complexities into elegant simplicity

PROFESSIONAL QUALIFICATIONS

Grad. Diploma in Financial Planning
Advanced Diploma in Financial Services (Financial Planning)
Diploma of Financial Services (FP)
SMSF accreditation
Certificate IV in Mortgage Broking
Direct Equities Program
Margin Lending and Geared Investments Program
Tax (Financial) Planner

SPECIALIST SKILLS

Investing + wealth preservation
Investment planning
Retirement planning
Practical investment education
Behavioural investment counselling
Personal goals setting & quantifying
Change fitness and coaching
Debt structuring and management
Practical cashflow strategies
Values based spending

MEMBERSHIPS AND ASSOCIATIONS

Authorised Representative of Charter Financial Planning
Member of Financial Advisers Association of Australia (FAAA)
Member of Responsible Investing Association of Australasia (RIAA)
Member of the Australian Financial Complaints Authority (AFCA)
Member of The Advisers Association (TAA)
Member of the Society of Advice

CAREER AND INDUSTRY HIGHLIGHTS

Awarded Most Trusted Adviser by the independent Beddoes Institute in 2014, 2015, 2016, 2017, 2018 and 2023.
Listed in Financial Standard's FSPOWER50 - The 50 most influential people in finance for 2013, 2014 & 2015.