

# RI Hornsby & Castle Hill



## CLIENTS Russ and Anne Dorey

We retired a little unsure whether our modest superannuation would provide us a comfortable and secure lifestyle. We'd also hoped for an occasional overseas trip, as we love to travel. Working with RetireInvest in Hornsby has more than fulfilled our dreams.

Mark gives us sound advice in relation to our investments and he proactively altered our allocated pensions to better suit our needs – which involved a lot of time and paperwork! He sensitively convinced us to take out a Power of Attorney, which was hard to face.

We know we are in for the long haul and the annual seminars remind us that the long run trend is what's important, so we simply ignore the stock market's constant rise and fall. Thanks to Mark's skilful handling of our portfolios, and despite the volatile financial climate, we have nearly as much in our super funds as when we retired.

We trust him implicitly, and best of all, we have managed to travel overseas nearly every year – a bonus beyond our wildest dreams!

Above: Russ and Anne Dorey



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Mark Robinson is the Financial Planning Manager of the practice and is responsible for providing financial advice to clients. Mark has been in the financial services industry for 23 years. His guiding principle when working with clients is that the money is ultimately theirs, and they should feel totally comfortable with where and how it is invested.

Mark is a Certified Financial Planner and a member of the Financial Planning Association's CFP Education Advisory Committee.

Mark is more than ably assisted by the RI Hornsby & Castle Hill team, who have been in the industry for many years and take great pride in getting to know all our clients and going the extra mile to help in any way they can.