

28th February 2013

Dear BNI

Testimonial for Jeannie Anderson – Mayberry, Meldrum & Anderson

As a director of one of the most client focused financial planning companies on the Gold Coast and Northern NSW region I rarely come in contact with an accountant that is truly focused on improving their clients overall financial situation. Most accountants simply want to process their client's numbers to complete their tax return and then that is as far as they go for their client. Jeannie Anderson is a refreshing exception to the norm.

Jeannie has shown time and time again her great aptitude and insight for understanding her client's situation and seeing hidden opportunities to improve their situation by bringing in further expertise in financial areas other than accounting. Every client that Jeannie has referred to was because of her ability to understand her clients full situation and identify where they could benefit from having further customized strategies put in place. In one clients example Jeannie identified the need for professional financial planning strategies and this resulted in the client gaining an extra \$45,000 of income in the first 2 years.

Jeannie has a very professional and friendly manner. She is confidential and all of her clients I have met hold her and her work in the highest regard. Jeannie goes out of her way to educate her clients and employees for the better, often sacrificing her own time to see those around her educated and improved.

I am very pleased and excited by the benefits being provided to Jeannie's clients that the combination of wealth accumulation and tax planning has brought about. Her knowledge, expertise, experience, and passion for assisting her clients gain control of their whole financial situation are truly refreshing, rarely found and highly valued.

Kind regards



Stephen Pollard
Director & Senior Adviser
Oasis Financial Planning