

Live the life you want to lead

Wherever you are on life's journey, there's a financial strategy to help you improve your prospects.

Every step counts towards achieving your financial goals and at any stage in life we can provide you with advice and support to manage your finances effectively.

Call in or contact us for a Fact Sheet on the services we provide.



Specialist services:

- Business Strategy & Advice
- Accounting
- Auditing
- Taxation
- Portfolio Management
- Superannuation
- Sharebroking
- Financial Planning

For further advice contact Strategem Financial Group.

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A Fresh Approach to Financial Management NEW CEO

The Partners of Strategem Financial Group announce the recent appointment of David Richardson as Chief Executive Officer.

AN ENTIRELY new position for Strategem, David's appointment marks a time of unprecedented growth for the firm where management of the now 60-strong team of accountants, financial managers and administrative staff has become an important priority.

'This appointment reflects a decision to provide a full-time focus to the management of a growing team and the strategic activities of the business,' Chairman of Strategem Financial Group, Kevin Martin said.

'We believe David is the best person to meet these challenges. It is a terrific outcome and the partners of Strategem are delighted' said Mr Martin.

David has managed professionals from a range of industries, including some of Australia's most pre-eminent scientists, agriculturists and medical professionals. His support at this high level has enabled notable influences in Australian society in areas as diverse as engineering, psychology and sport & recreation.



David Richardson, CEO, Strategem Financial Group

David holds a Bachelor of Arts as well as a Masters in Business Administration.

Originally from Bendigo, David returned with wife Louise and two children from Melbourne in 2002 to work with Primary Industries Research Victoria, his most recent appointment before joining the Strategem team.

Mr Martin said 'David's experience in providing high level support to a range of specialists and his intention to support us in our pursuit of excellence, provides Strategem with a unique opportunity.'

'The decision to create the role of Chief Executive Officer was in itself, strategic to better supporting our team of professionals - it's a fitting outcome,' he said.

PARTNERSHIP TEAM

THE EVOLUTION of Strategem Financial Group relies on the business expertise and vision of a group of partners.

With a focus on combining both business services and wealth creation, Strategem accountants and financial planners are well placed to meet the total financial needs of clients within a rapidly changing environment.

In the last two years, Strategem has welcomed Andrew Davies, Kevin Martin, and most recently, Stuart McKenzie to the partnership group of the organisation. After many years of outstanding service as partners of the group, Trevor Crockford and Michael McCartney now provide their expertise to the business as consultants.

Originally Ashman Ralph and Associates, Strategem has been providing financial advice to Central Victorians for over 40



L-R top to bottom: Peter Murphy, Andrew Davies, Stuart McKenzie, Trevor Elliott, Kevin Martin, Chris Harrington, Sharon Gleeson, Garry Chambers

years. A strong reputation locally has given Strategem the opportunity to extend its reach beyond Bendigo by offering integrated services in business and wealth creation.