

Capstone 2025 National Conference

Transformation –
navigating your future



First name	Surname	Organisation	State	Type
Bob	Chen	Everalls Wealth Management	ACT	Capstone adviser
Johannes (Gerrie)	Vermeulen	Everalls Wealth Management	ACT	Capstone adviser
Bruce	Adlam	Bruce Adlam Financial Planning	NSW	Capstone adviser
Steven	Allen	Allen Private Wealth Advice	NSW	Capstone adviser
Joel	Bones	IEC Financial Advisory	NSW	Capstone adviser
Dominic	Brown	Nest Financial Solutions	NSW	Capstone adviser
Tracy	Dyer	Element Wealth Solutions	NSW	Capstone adviser
Sandy	Gosper	SG Wealth	NSW	Capstone adviser
Craig	Hawkins	Financial Planning In The Hills	NSW	Capstone adviser
Hannah	Hawkins	Financial Planning In The Hills	NSW	Capstone adviser partner
Michael	Hillyard	Financial Planning In The Hills	NSW	Capstone adviser staff
Geoffrey (Geoff)	Hickman	Hickman & Ritchard Financial Planning	NSW	Capstone adviser
Sam	Hickman	Hickman & Ritchard Financial Planning	NSW	Capstone adviser staff
Gavin	Knight	Paladin Wealth Group	NSW	Capstone adviser
Scott	Mackett	Tandem Wealth	NSW	Capstone adviser
Jason	Matthews	Richardson Financial Advisory	NSW	Capstone adviser
Nicholas (Nick)	McKenna	Luka Financial	NSW	Capstone adviser
Tom	Muir	MySuper Advisory	NSW	Capstone adviser
Lyall	Richardson	Richardson Financial Advisory	NSW	Capstone adviser
Chelsea	Robinson	CarePlan Advisory Services	NSW	Capstone adviser
Nicholle	Shepherd	My Financial Advantage	NSW	Capstone adviser
Marnie	Crampton	My Financial Advantage	NSW	Capstone adviser staff
Stephanie	Stafford	Goal Financial Services	NSW	Capstone adviser
Michael	Tadros	Innovative Financial Services	NSW	Capstone adviser
Renee	Tang	MySuper Advisory	NSW	Capstone adviser
Paul	Tynan	Walker Wayland (NSW) Financial Services	NSW	Capstone adviser
Matthew	Vagg	Crystal Australia Investments	NSW	Capstone adviser
Robert	Warry	Goal Financial Services	NSW	Capstone adviser
Robert (Rob)	Wright	BMB Private Wealth Pty Ltd	NSW	Capstone adviser
Nikki	Ashurst	BMO Financial Solutions	QLD	Capstone adviser staff
Paul	Bronson	Bronson Financial Services	QLD	Capstone adviser
Jemma	Bailey	BMO Financial Solutions	QLD	Capstone adviser
James	Carman	Azure Advice	QLD	Capstone adviser
Cassandra	Carman	Azure Advice	QLD	Capstone adviser partner
Aaron	Crosthwaite	Cogniti Wealth	QLD	Capstone adviser
Vicky	Gilroy	Hive Financial Planning	QLD	Capstone adviser
Gavin	Hammond	Robins Financial Planning	QLD	Capstone adviser
Maritza	Kriel	MK Wealth Solutions	QLD	Capstone adviser
Shane	Lee	BMO Financial Solutions	QLD	Capstone adviser
Marcus	Leggat	Fitzroy Financial Advice	QLD	Capstone adviser
Luke	Marton	Luke Marton Financial Services	QLD	Capstone adviser
Eleni	Michael	Candour Wealth Advice	QLD	Capstone adviser
Shaun	Nembach	Hive Financial Planning	QLD	Capstone adviser
Tom	Neylan	Sharpe Financial Solutions	QLD	Capstone adviser
Sean	Nigh	Intelligere Wealth	QLD	Capstone adviser
Brendan	O'Reilly	Peak Advice	QLD	Capstone adviser
Geoff	Sharpe	Sharpe Financial Solutions	QLD	Capstone adviser
Sharan	Sheth	Intelligere Wealth	QLD	Capstone adviser
Malcolm (Mal)	Smith	BMO Financial Solutions	QLD	Capstone adviser
Helen	Stevenson	Strategic Retirement Solutions	QLD	Capstone adviser
Leesa	Swain	LaVie Avec Wealth Advice	QLD	Capstone adviser
Nikki	Szprinc	DC Advisory Group	QLD	Capstone adviser
Cassandra	Troy	Robins Financial Planning	QLD	Capstone adviser
Nick	Tzoutzias	Fitzroy Financial Advice	QLD	Capstone adviser
Michael	van Loenen	Cogniti Wealth	QLD	Capstone adviser
Carl	Wade	DC Advisory Group	QLD	Capstone adviser
Lucas	Barsby	Rockhopper Wealth	SA	Capstone adviser
Nicole	Heales	Nicole Heales Financial	SA	Capstone adviser
Matthew (Matt)	Kerrish	MPK Advisory Services	SA	Capstone adviser
Cassandra	Sorby-Adams	Wagtail Wealth	SA	Capstone adviser
Benjamin (Ben)	Coxen	Coxen Financial Planning	TAS	Capstone adviser
Joshua (Josh)	Smith	Coxen Financial Planning	TAS	Capstone adviser
Marc	Wierzbicki	Acuity Wealth Management	TAS	Capstone adviser

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First name	Surname	Organisation	State	Type
Kristianne (Kristi)	Badgery	Breakwater Financial Planning	VIC	Capstone adviser
Rohan	Benstead	Kalpa Wealth Management	VIC	Capstone adviser
Grant	Brook	Aletheia Wealth	VIC	Capstone adviser
Amy	Bumpstead	Nett Assets Financial Planning	VIC	Capstone adviser
Nicole	Holm	Butler Private	VIC	Capstone adviser
Andrew	Clark	Be Ready Wealth	VIC	Capstone adviser
Ashley	Collins	Collinsfp	VIC	Capstone adviser
Nick	Comninacis	Goldfinity Financial Planning	VIC	Capstone adviser
Mary	Comninacis	Goldfinity Financial Planning	VIC	Capstone adviser partner
Stephen	Coulston	Quadrant Financial Planning Wodonga	VIC	Capstone adviser
Sarah	Crothers	Crothers & Associates	VIC	Capstone adviser
Trent	Crothers	Crothers & Associates	VIC	Capstone adviser
Andrea	Dawson	Paris Financial Services	VIC	Capstone adviser
Sitparan	Gnanendran	Partner Financial Group	VIC	Capstone adviser
Rochelle	Green	Be Ready Wealth	VIC	Capstone adviser
Andrew	Greve	OP Wealth	VIC	Capstone adviser
Steven	Hall	Secure Nest Australia	VIC	Capstone adviser
Warwick	Hawksworth	Capstone Financial Services	VIC	Capstone adviser
Chris	Kalpenos	Aletheia Wealth	VIC	Capstone adviser
Andrew	Kays	Premier Investment Solutions	VIC	Capstone adviser
Terry	Kays	Premier Investment Solutions	VIC	Capstone adviser
Rosemarie	Kays	Premier Investment Solutions	VIC	Capstone adviser partner
Alex	Kiss	Finvisory	VIC	Capstone adviser
Chris	Kouteris	Kouteris Financial	VIC	Capstone adviser
Daniel	Leow	Soda Wealth	VIC	Capstone adviser
Matthew	MacDonald	Intelligent Financial Outcomes	VIC	Capstone adviser
Luke	Marsden	Marsden Financial	VIC	Capstone adviser
Steven	Mclver	Breakwater Financial Planning	VIC	Capstone adviser
Daniel (Danny)	Nolan	Nolan Financial Planning	VIC	Capstone adviser
Mark	Pakavakis	Ramco Advisory	VIC	Capstone adviser
Chetan	Patel	Prosper & Grow Financial Services	VIC	Capstone adviser
Tim	Plumridge	TDP Advisory	VIC	Capstone adviser
Kellie	Rayner	Rayner Planners	VIC	Capstone adviser
Darryl	Rayner	Rayner Planners	VIC	Capstone adviser partner
Arthur	Roe	ARA Financial Planning Services	VIC	Capstone adviser
Suzie	Roe	ARA Financial Planning Services	VIC	Capstone adviser partner
Gino	Roussety	Ramco Advisory	VIC	Capstone adviser
Barbara	Sideras	BKS Wealth Solutions	VIC	Capstone adviser
Elena	Skazas	Accounting Associates Wealth Creation	VIC	Capstone adviser
Neil	Tolsher	Quadrant Financial Planning Wodonga	VIC	Capstone adviser
Sasha	Topolcsanyi	AYR Group	VIC	Capstone adviser
Nicholas (Nick)	Tunbridge	ToppTunbridge	VIC	Capstone adviser
Tom	Weir	B&W Additions	VIC	Capstone adviser
Lachlan	Weir	B&W Additions	VIC	Capstone adviser
Michael	Zelencich	Capstone Financial Services	VIC	Capstone adviser
Wade	Croome	Stepwise Financial Planning	WA	Capstone adviser
Alex	Eades	Bay Wealth & Protection	WA	Capstone adviser
David	Fleming	Promenade Wealth Management	WA	Capstone adviser
Joshua	Fleming	Promenade Wealth Management	WA	Capstone adviser
Lisa	Gavranich	Cherry Tree Financial Planning	WA	Capstone adviser
Pinky	Lam	Alpmega Advisory	WA	Capstone adviser
Joscelin	Pishos	Butler Settineri Wealth Management	WA	Capstone adviser
Simon	Bayley	Capstone Financial Planning	VIC	Capstone staff
Rachael	Beveridge	Capstone Financial Planning	VIC	Capstone staff
Prem	Gill	Capstone Financial Planning	VIC	Capstone staff
Tim	McCallum	Capstone Financial Planning	WA	Capstone staff
Grant	O'Riley	Capstone Financial Planning	VIC	Capstone staff
Marcus	O'Sullivan	Capstone Financial Planning	QLD	Capstone staff
Hector	Rodriguez	Capstone Financial Planning	VIC	Capstone staff
Kym	Turner	Capstone Financial Planning	VIC	Capstone staff



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First name	Surname	Organisation	State	Type
Mick	Kidd	MLC	QLD	Capstone Training and Education Partner
James	Winder	MLC	NSW	Capstone Training and Education Partner
Michael	Gordon	CFS	NSW	Capstone Training and Education Partner
Brock	Jeffery-Warren	CFS	NSW	Capstone Training and Education Partner
Mark	Kennedy	BT	NSW	Capstone Training and Education Partner
Stuart	Matheson	BT	VIC	Capstone Training and Education Partner
Greg	Newman	HUB24	WA	Capstone Training and Education Partner
Jerome	Swindon	HUB24	VIC	Capstone Training and Education Partner
Jodie	Davis	Challenger	VIC	Capstone Training and Education Partner
Wilson	O'Fee	Challenger	VIC	Capstone Training and Education Partner
Nicole	Garrett	Lonsec	QLD	Capstone Training and Education Partner
Tony	Nejasmic	Lonsec	NSW	Capstone Training and Education Partner
Brennan	Ivanov	TAL	WA	Capstone Training and Education Partner
Daniel	Moore	Perpetual	VIC	Capstone Training and Education Partner
Di	Ranger	Magellan	SA	Capstone Training and Education Partner
Andrea	McGarry	Ausbil	QLD	Capstone Training and Education Partner
Allan	Evans	L1 Capital	VIC	Capstone Training and Education Partner