

Mirella Cavallaro

Yellow Brick Road Wealth Management
Glen Huntly

Mirella Cavallaro, Wealth Manager & Principal at Yellow Brick Road Glen Huntly, brings a vast array of financial knowledge and experience to the area.

With many years in the industry, Mirella holds the credentials to provide the best possible service. She has a Bachelor of Business (Accounting), is a Certified Practising Accountant – Financial Planning Specialist Designation (CPA|FPS), holds an Advanced Diploma of Financial Services (Financial Planning) and a Diploma of Finance and Mortgage Broking Management.

With her solid knowledge of the finance market, Mirella understands the demands and financial pressures people face today. Whether you are at the start of your journey, looking to purchase your first home, a family with children, or looking to retire in the near future, she can assist you in achieving your financial goals.

“I want to be your go to person when it comes to anything that falls under the banner of wealth management. I strongly believe in establishing long term client relationships and assisting you with achieving and protecting your financial goals.”

Mirella is a Credit Representative (427503) of Yellow Brick Road Finance (ACL 393 195) and an Authorised Representative (296981) of Yellow Brick Road Wealth Management (AFSL 323 825), authorised to deal in and provide Personal Advice on:

- Basic and non-basic deposit products
- Superannuation, including Self Managed Superannuation
- Life Insurance
- Securities

So call Yellow Brick Road Glen Huntly today and see what Mirella can do for you.

“I believe in building long term relationships with my clients by being available to provide professional and specialised advice and guidance on all facets of their wealth management needs, when they need it.”

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Yellow Brick Road Wealth Management

Home loans

Yellow Brick Road works with a wide range of lending institutions, including banks. With access to over 35 lenders and over 300 home loan products we can provide you with the information you need to make a decision on the home loan that's right for you. Your Wealth Manager's priority is to match your needs with a suitable and competitive product – keeping it simple and taking the unknown out of the home loan process.

Financial planning

Our specialised financial planning team is able to develop unique financial plans which fit long term business and personal objectives.

If you cannot answer the question "How much do I need to retire, and when will I reach this goal?", then you need a financial plan. Success requires minimising tax and investment risk through conservative investment approaches. Talk to us about the minimal losses our typical clients have experienced during the Global Financial Crisis. You may well be surprised.

Accounting & tax

With a team of more than 50 accounting and tax professionals we have the skills to help clients who are looking for responsiveness and attention to detail. Our client base includes many small and medium sized business proprietors, as well as professionals and executives who need tax and accounting advice. We know how to optimise tax outcomes while protecting wealth for the long term, using Family Trust and Self Managed Super structures.

Insurance

Yellow Brick Road General Insurance acts as an insurance broker for our clients, both individuals and small businesses. We have access to all the major and specialised insurers in the Australian market. Our experts have the skills to find the appropriate level of cover for most levels of risk. Many of our clients find that we are also able to save them money by better understanding their true needs.

Talk to your Wealth Manager today.

www.ybr.com.au

"For a long time now, it has been my dream to help all Australians access the quality financial advice they deserve. I also recognise that there are two great dreams in life. The first is to own your own home and the second is to retire comfortably. So in 2007, I founded Yellow Brick Road Wealth Management with the intention to take a different approach, one that focussed on producing complete, long term solutions for our clients."

Mark Bouris, Executive Chairman



YellowBrickRoad
Wealth Management