Prime

Cindy Excell

Private Client Adviser

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Qualifications & Designations

- Certified Financial Planner™
- SMSF Specialist Advisor™
- Master of Applied Finance
- Graduate Diploma of Financial Planning
- Bachelor of Economics (Accounting)

Expertise

Cindy can advise on the following product areas

- ✓ Deposit and Payment Products
- ✓ Derivatives
- ✓ Government Debentures, Stocks or
- ✓ Bonds
- ✓ Life Products
- ✓ Managed Investment Schemes
- ✓ Retirement Savings Account Products
- ✓ Securities
- ✓ Superannuation
- ✓ Margin Lending Facility

Prime Financial Group

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About Cindy

Cindy is a Private Client Adviser at Prime Financial Group in Sydney, with over 19 years of experience in the wealth management and financial advice industry. She helps high-net-worth clients, business owners, and wholesale investors structure, grow, and protect their wealth with clarity and confidence.

Her expertise spans strategic and investment advice - from superannuation and retirement planning, tax-effective structures and Self-Managed Super Funds, through to estate and intergenerational planning, portfolio management, and tailored strategies that help high-net-worth clients preserve and grow their wealth.

She has previously held senior advisory roles at Macquarie Bank, Commonwealth Private Bank, and Australian Unity's Wealth and Capital Markets division, where she was a finalist for *Adviser of the Year* in 2023.

Cindy's extensive experience working with high-net-worth clients allows her to guide them through complex financial decisions with confidence, always taking a client-centric approach to help them achieve their financial goals with clarity and peace of mind. She also enjoys mentoring aspiring advisers and supporting the next generation of professionals in the industry.

Advisory Services

Our financial services are personalised to our clients' needs. We can provide a total financial solution, or alternatively advice can be limited to a particular service or situation, including:

- ✓ Financial & Retirement Planning
- ✓ Wealth Creation, Accumulation & Consolidation
- ✓ Retirement Planning Strategies
- ✓ Investment Advice
- ✓ Life Insurance
- ✓ Superannuation Advice including Self Managed Superannuation Fund (SMSF)
- ✓ Wills & Estate Planning
- ✓ Business Succession Planning
- ✓ Asset Protection
- ✓ Lending & Finance

aspire, innovate, grow & impact