

Olivia Maragna

A specialist in developing effective wealth creation strategies for clients, Olivia Maragna is passionate about providing the kind of advice and support you need to achieve a better quality of life now and throughout future stages of your life.

Her laser focus on providing the best possible client service has been the driving force behind her success. Olivia is passionate about ensuring you understand and feel comfortable with your financial affairs. She'll work very closely with you, explaining concepts in Plain English and providing you with a range of strategies designed to keep you firmly in control of your affairs, minimise risk, and at the same time, free you from financial stress.

Olivia takes the time to work one on one with each client to ensure they fully understand the complexities of their financial affairs, empowering them to become more astute investors so they can actively grow their wealth.

The trust many of her clients place in her has led to the development of strong friendships and ongoing referrals from clients' friends and family members. Aspire Retire clients now include several generations within a family. The peace of mind Olivia delivers to clients, knowing their financial future is being prudently managed, enables them to truly enjoy their lives.



Qualifications

Olivia is a Certified Financial Planner® (CFP), Chartered Accountant (CA), Fellow SMSF

Specialist Advisor® (FSSA) with the SMSF Association and has a Bachelor of Business in Accounting from QUT, majoring in accounting, business law and taxation. At 28, Olivia was the youngest Australian to receive all three CFP, CA and SSA certifications.

Experience

Olivia's career spans internationally recognised Chartered Accounting firms to national stockbrokers. She is experienced in providing advice to a broad range of clients including retirees, executives, wealth accumulators, small and family businesses, self-managed superannuation funds and individuals.

A popular speaker, Olivia is committed to improving individuals' financial education. She has been chosen as one of eighteen of Australia's most inspiring female leaders in the Leadership in Focus Forum and represented Australia in a Global Forum in Switzerland. She is a sought after speaker on money and business across the country at various national/international organisations and currently serves as a judge for the Telstra Business and Women's Awards.

Specialisation

Olivia specialises in superannuation, retirement planning, taxation and estate planning. She is focussed on providing effective strategies to help you increase your wealth in a tax effective way, managing your portfolio during retirement, and ensuring a smooth transition to your next family generation, when the time comes. If desired, she can also brief your family about your financial affairs as a contingency, should anything happen to you.

Memberships

Olivia is a member of the Financial Advice Association Australia (FAAA), Institute of Chartered Accountants Australia (ICAA) and a Fellow member of the SMSF Association.

Awards

2022, 2021, and 2020 Australia's Top Financial Advisers List.
2019 Australia's Top 50 Financial Advisers.
2012 Adviser of the Year, Association of Financial