

# Dr. Dennis J. Maddern



## Academic Qualifications

- Bachelor of Science (Business/Education)
- Master of Arts (Organisational Improvement)
- Doctor of Philosophy (Business/Organisational Behaviour)
- Advanced Diploma Financial Services (Fin Planning)
- Certified Insurance Professional CIP
- Fellow Chartered Financial Practitioner FChFP
- SSA™ SMSF Specialist Advisor
- Certified Financial Strategist CFS
- Fellow - Australian and New Zealand Institute of Insurance and Finance (ANZIIF)
- Fellow - Financial Services Institute of Australasia (FINSIA)

## Affiliations and Memberships

- Self Managed Super Fund Association
- Australian and New Zealand Institute of Insurance and Finance (ANZIF)
- Association of Financial Advisers (AFA)
- Association of Independently owned Financial Professionals (AIOFP)
- Independent Financial Advisers Association of Australia (IFAAA)
- Financial Services Institute of Australasia (FINSIA)

## Recognitions and Awards

- 2009 AFA Australian 'Student of the Year'
- 2010 AIOFP Australian 'Adviser of the Year'
- 2012 Wealth Professional Magazine - Top 3 Advisers in Australia
- 2014 IFA Magazine - 'Financial Adviser of the Year' - Finalist
- 2015 IFA Magazine - 'Boutique Financial Advice Firm of the Year' - Finalist
- 2017 Optus My Business Award - 'Finance Business of the Year' - Finalist
- 2018 IFA Excellence Awards - 'Holistic Advice Firm of the Year' - Finalist
- 2018 IFA Excellence Awards - 'Best Client Servicing (Company)' - Finalist



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# Career Overview

Dr. Maddern completed a Ph.D. in the USA in Organisational Behaviour. Dennis is also an internationally recognised Fellow Chartered Financial Practitioner (FChFP), a Certified Financial Strategist, and a SSATM SMSF Specialist Advisor. In 2010

Dr. Maddern was honoured Nationwide with 'Adviser of the Year' by the Association of Independently Owned Financial Professionals (AIOFP). In 2009, he was also awarded nationally the 'Student of the Year' by the Association of Financial Advisers (AFA). During 2012, Dennis was further recognised with a designation in the top 3 Financial Advisers in Australia, by renowned Wealth Professional magazine.

Dennis founded Maddern Financial Advisers in 2003, and currently leads the Maddern Financial Advisers team. With his specialised business knowledge and deep financial industry experience, Dennis assists his clients to focus on their wealth creation, and wealth protection strategies.

Dennis is an internationally recognised speaker and consultant. His doctoral thesis on Organisational Change at the University of Oklahoma, USA, and post-doctoral work at Stanford University, led to a range of top management positions with leading international companies.

Whilst working and studying in the United States, Dr Maddern played professional tennis, gaining All-American consideration. He also played Linton Cup for Victoria, and was a member of the Australian Junior Davis Cup Team. He is a three times winner of the Kooyong Club Championships (1984, 1994 and 1995).

## Maddern Financial Advisers Pty Ltd

### Our Beginning

Maddern Financial Advisers was established in 2003, when we identified the need for successful professionals to receive strategic financial advice and high level analysis from an independent financial advice firm with the technical ability of a large firm, but the care and service level of a boutique firm. Throughout its history, Maddern Financial Advisers has been honoured with many awards, most recently being named as a finalist in the prestigious Boutique Advice Firm of the Year.

### Industry Specialists

Our business has attracted a team of industry specialists who are committed to the highest standards of professionalism, integrity and client focus. With a Chartered Accounting firm, a dedicated SMSF accounting team and a mortgage broker, we offer our clients a complete holistic advice service tailored to their individual needs. We also have an extensive network of other professionals that we utilise and refer to, where our clients need assistance outside the scope of what we do.

### Independently Owned

Unlike most Australian financial advice firms, Maddern Financial Advisers isn't wholly or partly owned by a bank or other financial institution. This means we're under no pressure to recommend particular products. We work on a strictly fee-for-service basis – we don't accept benefits from product manufacturers in return for use of products.

In other words, we don't serve two masters: when you become our client, we work for you and only you.

## Financial Advice

### Our value

Dennis Maddern provides clients with wealth creation advice, utilising diverse superannuation, personal investment and tax-effective strategies. His proven approach, across a diverse client base, is consistent and superior. Long-term investment success is gained through diversification across all domestic and international asset classes and styles of investment management.

### Ongoing Client Care

Dennis and his team have a philosophy of client care, which is reinforced by regular quarterly, half-yearly and annual one-on-one reviews. Dennis also makes time to personally attend to clients who require additional advice or services.

### Service Excellence

Dennis prides himself on superior customer service, which is customised to meet specific needs and lifestyle circumstances. His proven investment strategies are drawn from a wealth of knowledge, primarily gained through years of experience in advising and improving business performance for multinational and global corporations alike.

