

MEDIA RELEASE

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For immediate release

Local business wins two awards for financial advice

Local financial advisers, Gene Youl and Dallas Ludeman of Silvan Ridge Financial Services have picked up two prestigious awards from the Charter Financial Planning Licensee.

Gene Youl was awarded the National Value of Advice Award, an award based upon a real life client case where the financial adviser is seen to go above and beyond what is normally expected, making a material difference to the life of the client.

To win, the adviser must demonstrate expertise in all facets of financial planning and show compassion for the client's personal and financial situation.

Gene Youl, practice principal said, "It's extremely rewarding to see my clients come back from a difficult financial position to now be running two thriving businesses."

"Helping people reach their goals in life and building strong relationships with them over a long period of time is very satisfying."

Gene helped his clients over a five year period, much of which was pro bono, with refinancing loans, reducing interest payments and restructuring assets under threat of repossession.

The second award, The Gerald Lippman Perpetual Trophy, was picked up by Dallas Ludeman also of Silvan Ridge Financial Services.

Since 1989, the Gerald Lippman Perpetual Trophy has been awarded to the adviser who has made the greatest contribution to Charter's advice community. The award considers the contribution the adviser has made to the financial planning profession, their involvement within their community, the support they offer their colleagues and the quality of their practice. Named after Gerald Lippman, a pioneer in the Australian financial services industry, the award is the highest honour Charter can bestow on an adviser.

Dallas Ludeman, practice principal said, "I'm extremely humbled by this award. It's a great feeling to be recognised professionally and personally for my contribution to both my local community and the Charter advice network.

Dallas is an Executive Committee Member and Past President of the Koroit Football & Netball Club, the Sponsorship Coordinator of the Koroit Irish Festival, has been involved in the Deakin Business & Law faculty and sits on the Board of the Charter Authorised Representatives Association as the Director for Vic/Tas as well as sitting on two sub committees for the association.

Media enquiries:
Gene Youl, Principal, Silvan Ridge Financial Services
Ph: 5559 7111