Adviser Profile

Dana Gibbs

Senior Wealth Adviser

GradDipFinPlan

TheWealthDesigners. LIVE WELL.™

11 November 2025

Profile

Dana has been in the financial services industry for over two decades. She prides herself on the strong relationships she builds with her clients and being able to assist them to live their best lives brings Dana “pure joy”.

An avid listener, Dana knows the importance of listening carefully to her clients, responding to their wants and needs and finding advice strategies to deliver. She particularly enjoys strategising, being able to monitor and track goals and effectively adjusting when life throws a curve ball.

Dana enjoys assisting clients from all backgrounds, at all stages of their journey, believing each to be exciting and full of its own complexities.
She loves to educate as well as advise so her clients feel integral to the process and in control of their financial futures.

While Dana enjoys celebrating the wins, she also understands the importance of being there when life doesn’t go according to plan. Dana’s clients know she’s there to support and provide advice and guidance during all of life’s challenges.

Dana's background

Dana started her career as a Financial Planning Assistant / Paraplanner in Melbourne while commencing her studies.

After moving back to her hometown of Perth, she worked for a boutique financial planning services company that recognised her natural ability to engage with clients and passion for all things advice related. She was encouraged to complete her studies and become a licenced Adviser.

Within a few years, Dana was provided with an opportunity to own part of the business.

When this business merged with The Wealth Designers in 2023, Dana joined the team of one of Australia’s best boutique Advisory firms as a Senior Wealth Adviser.

Dana’s ground up knowledge of financial planning is invaluable. She understands the process from the first inception, ensuring all work is of a top tier standard.

Your Adviser & Practice

Dana Gibbs is an Authorised Representative (No. 1251156) of TWD Licensee Services Pty Ltd (ABN 88 605 064 480 AFSL 475964). Dana Gibbs provides advice and services on behalf of the following Corporate Authorised Representatives of TWD Licensee Services Pty Ltd:

- TWD Australia Pty Ltd, Corporate Authorised Representative (No. 1266864)
- TWD Solutions Pty Ltd, Corporate Authorised Representative (No. 1305381)
- SW-TWD Wealth Pty Ltd, Corporate Authorised Representative (No. 1266742)

TWD Australia Pty Ltd, TWD Solutions Pty Ltd, and SW-TWD Wealth Pty Ltd are part of The Wealth Designers Group of companies and provide a range of financial advice and assistance to help people grow, manage, and protect their wealth. Your adviser provides expert professional advice to help you achieve what you want out of life.

Dana Gibbs is an employee and as a result will receive a salary. She may also receive a performance bonus which may be based on certain performance criteria, such as client retention, compliance, and the revenue she generates, as well as other factors. The bonus potential does not influence the advice, or any recommendations made.

If you would like to make time to discuss your financial needs and objectives in more detail, please contact Dana Gibbs at 1300 893 000 or Dana.Gibbs@twd.com.au

Memberships

- Financial Advice Association Australia (FAAA)

Qualifications

- Graduate Diploma of Financial Planning
- Advanced Diploma of Financial Planning
- Diploma of Financial Planning

Dana's expertise and skills

- Financial complexity management
- Superannuation structures
- Contribution strategies
- Retirement planning and pension strategies
- Tax management & planning
- Portfolio construction and active management
- Personal insurances
- Personal cash flow planning & budgeting
- Asset projections & analysis
- Debt management & reduction strategies
- Estate planning

Advice Your Adviser Can Provide:

STRATEGIES

- Investment strategies including gearing and savings plans
- Budget and cash flow planning
- Debt management
- Superannuation advice, including salary sacrifice and consolidation strategies
- Personal insurance strategies
- Centrelink / DVA advice
- Retirement planning advice
- Estate planning advice
- Portfolio review services
- Ongoing advisory services
- Referrals to specialists e.g. accountants, solicitors, mortgage and general insurance brokers

PRODUCTS

- Basic and non-basic deposit products
- Government debentures, stocks or bonds
- Investment life insurance products or life risk insurance products
- Interests in managed investment schemes, including investor directed portfolio services (IDPS) and Separately Managed Accounts (SMAs)
- Retirement savings accounts
- Securities
- Superannuation

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