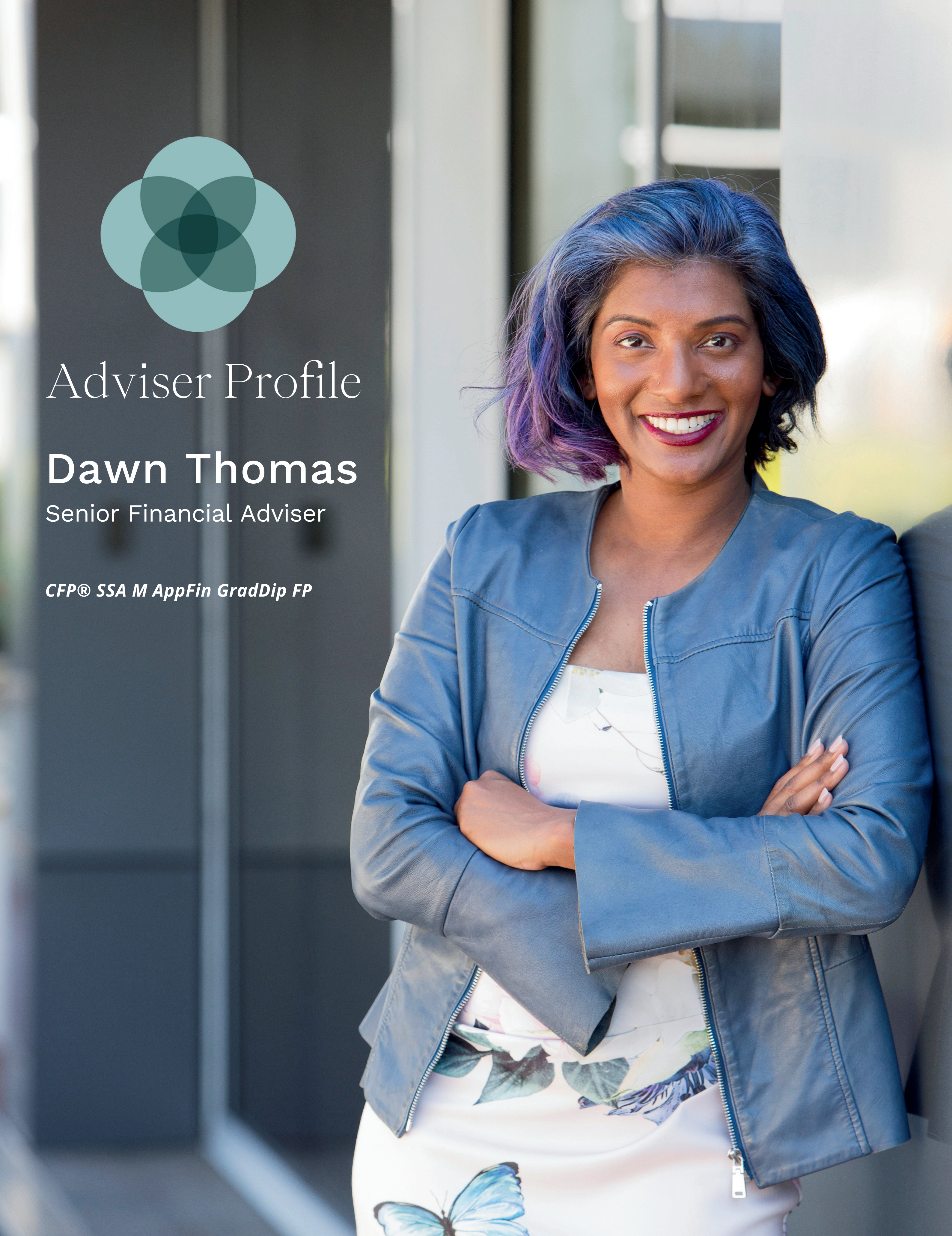

Adviser Profile

Dawn Thomas

Senior Financial Adviser

CFP® SSA M AppFin GradDip FP

Profile

Her heart led approach to advice is based on building a relationship of trust and creating bespoke advice based on the life goals and objectives of her clients. Dawn's strength is in translating the complexity of financial concepts and calming the chaos of a financial position into an empowered plan to move forward with.

Originally a Murdoch University Media Studies graduate, Dawn was drawn to the financial planning industry in 2008 because of her innate ability to connect to people and their life stories. She assists clients from a broad range of backgrounds such as retirees, professional women, accumulators, widowers, farmers and pharmacists.

Dawn's background

Dawn Thomas is a self-professed superannuation nerd, a part-time PhD Student researching the superannuation behaviour of Gen Z, and a mother of three. She was the National Chair of FAAA's Inspire from 2021 to 2024, which is a group that focuses on improving the outcomes of women in the advice profession and women seeking advice. When she is not providing financial advice, she relaxes by cooking for loved ones or playing hockey.

In 2020, 2021, 2022, 2023 and 2025 as a recognition of financial literacy work and advocacy of the financial planning profession, Dawn was listed in Financial Standard's Power 50, which recognises the most influential financial advisers in Australia.

In recognising her work in lifting outcomes of women and young people in her community, she won the 2019 Association of Financial Adviser's (AFA) Female Excellence in Advice Award, IFA Excellence Award for Transformation of the Year 2022. 2023 IFA Excellence (Individual) winner, IFA Thought Leader of the year 2023 and The Great Advice Award (WA) in 2021. Most recently Dawn was awarded Financial Planner of the Year (Overall), Financial Planner of the Year (WA/SA/TAS) and Finalist for Women of the Year at the 2025 Women in Wealth Awards.

She joined The Wealth Designers in July 2022 to enable her to continue offering advice with heart to more members of the community.

Your Adviser & Practice

Dawn Thomas is an Authorised Representative (No. 001001284) of TWD Licensee Services Pty Ltd (ABN 88 605 064 480 AFSL 475964). Dawn Thomas 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.

Dawn Thomas 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 Dawn Thomas on 1300 893 000 or Dawn.Thomas@twd.com.au.

Memberships

- Self Managed Super Fund Association
- Financial Advice Association Australia (FAAA)

Qualifications

- Bachelor of Media Studies (Radio and Screen & Sound)
- Bachelor of Mass Communications (Journalism)
- Graduate Diploma of Financial Planning
- Masters of Applied Finance
- Certified Financial Planner
- SMSF Specialist Adviser
- Kaplan Accredited Listed Product Adviser Program

1300 893 000
twd.com.au
@WealthDesigners

Perth
Level 4
40 Kings Park Rd
West Perth WA 6005

PO Box 539
West Perth
WA 6872

Sydney
Level 7, Aurora Place
88 Phillip Street
Sydney NSW 2000

Dawn's expertise and skills

- Financial complexity management
- Superannuation structures and self-managed super funds
- Contribution strategies
- Retirement planning and pension strategies
- Tax management & planning
- Portfolio construction and active management
- Divorce settlement planning and advice
- 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
- Advice on ownership and structures e.g. discretionary and family trusts, Self-Managed Superannuation
- Philanthropy & personal charitable giving strategies
- 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
- Standard margin lending facilities