Our Team at TAG

TAG FINANCIAL

Trust Attention Guidance

GERRY BAKER
Principal, Adviser & Authorised Representative (No. 239331)

Gerry has been providing financial advice to clients since 1987 and is a founding Principal of TAG Financial. Gerry specialises in giving advice in the following disciplines: corporate superannuation, personal insurances, business insurances and succession planning.

DAVID MILLS Adv Dip.FS (FP)
Principal, Adviser & Authorised Representative (No. 257682)

David has been involved in the financial services industry since 1975 and is a founding Principal of TAG Financial. David specialises in giving holistic advice to a broad range of clients.

MARK BROGAN Adv Dip. FP, B.Sc
Adviser & Authorised Representative (No. 1004865)

Mark became a financial adviser in 2006 and has extensive experience in investment, superannuation and retirement planning, wealth accumulation, estate planning and personal risk advice.

GREG McLOUGHLIN CFP®, M Comm (FP), B Bus (Acc)
Adviser & Authorised Representative (No. 412015)

Greg became a financial adviser in 2011 and has experience in investment, superannuation and retirement planning, wealth accumulation, estate planning and personal risk advice.

JACK HADDAD B Bus (FP)
Adviser & Authorised Representative (No. 1243365)

Jack has been providing financial advice to clients since 2016 and has experience in investment, superannuation, retirement planning, wealth accumulation, estate planning and personal risk advice.

DANIELLE POYNTING
Practice Manager & Investment Client Care Manager

Danielle has been with TAG Financial since inception and is the group's Practice Manager providing management support to the Directors. While being responsible for the Client Care team, she also provides comprehensive administrative support to the business whilst helping clients with general enquiries regarding their superannuation and investment portfolios.

JULIE JACKSON
Group Risk Manager

Julie joined TAG Financial in 2004. She is responsible for Christian School's group policies including claims and provides strong administrative and valuable support to all involved in this area. Julie also heads our claims management program for our insurance clients.

RYAN PHAN
Paraplanner

Ryan joined TAG Financial in September 2022. Ryan is responsible for the paraplanning services to our team of advisers via technical/product research and ensuring all advice documents are compliant and continue to be of high quality.

MELINDA McCUMISKEY
Risk Client Care Manager

Melinda joined TAG Financial in 2005 and provides administrative support to the advisers whilst handling general enquiries from clients regarding their insurance portfolios.

RASHMI KATARIA
Investment Client Care Manager

Rashmi joined TAG Financial in September 2022 and provides administration support to the advisers, whilst helping clients with general enquiries regarding their superannuation and investment portfolios.

JENNIFER GANNON
Receptionist & Office Administration

Jennifer joined TAG Financial in 2011 as our Receptionist and also provides administrative support to the advisers and staff.

TRACEY DAMTOFT
Office Administration

Tracey joined TAG Financial in 2006 and provides administrative support to the staff and advisers.

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