Meet Your Adviser

ABOUT

Darren Johns is the Director of Align Financial. He was awarded the prestigious 'Adviser of the Year' accolade in 2016 by the Association of Financial Advisers and was selected to join the Most Trusted Advisers group as a result of outstanding feedback from his clients.

Darren has a Bachelor of Mathematics. He is an accredited SMSF Specialist Advisor ™, a Certified Financial Planner® and one of Australia's only financial life planners.

A born and bred Northern Beaches boy, he has an active interest in many sports and with two young boys, you won't see him sitting idle. Between refereeing local football matches, teaching his boys to surf or lining up a birdie putt on the golf course, when he isn't working, Darren is 'on the go'.

You may have seen him occasionally on Foxtel's Sky News business program *Your Money Your Call*, or quoted in publications including the Australian Financial Review or The Sydney Morning Herald.

No two human beings are exactly alike and similarly, no two financial plans are the same.

This is the time where we listen and learn about you; your values, your aspirations, your financial goals. We work with you to determine how we can help reach your goals. We look at where you are, where you want to go and find a way to get there.

Our Financial Planning Process

STEP ONE
Discovery

STEP TWO
Interpret

STEP THREE
Mutual Commitment

STEP FOUR
90 Day Follow-Up

Check that everything is in place.

We meet to recap the results you can expect and answer your questions. We also understand that things can change. That's why we review and adjust your financial plan as necessary. We're on your side.

Let's Implement

We work with you to implement your plan over the areas relevant to your individual goal. We meet with you to outline the results you can expect in the short and long term path to your financial security, and we keep you abreast of the big picture.

This is the exciting part!

Did we hear you correctly?

We want to make sure we understand you. So we send you an interpretation paper with a complete diagnosis of your current financial situation and our recommendations on the strategy required to reach your goals. This plan will form the foundation of how we work together.

Align Financial prides itself on lifelong relationships and we encourage you to take the time necessary to be comfortable with all aspects of our proposal prior to taking the next step.

5 QUESTIONS FOR DARREN

What do you love most about your career?

Being able to help people live their ideal life and helping them understand how to use money.

What is your experience as a financial adviser?

I've always worked in a small, self-licensed business so my experience is more around solving clients most pressing financial challenges rather than meeting a sales target. Boutique firms tend to work differently to banks and large institutions.

What type of clients do you specialise in?

We look after 3 types of clients. Firstly, people who are suddenly single and face making financial decisions alone, often for the first time. Secondly, those who are winding down and don't want to spend their non-working years trying to teach themselves finance. And thirdly, couples with good incomes but no time to dedicate to their own financial wellbeing.

What are the things you value most in life?

9 hours of sleep each night and weekends with family.

If you won the lottery tomorrow, how would you live your life?

I would continue to align my values with my actions. And buy a better second-hand surfboard.

About Us

Align Financial is an award-winning, privately owned financial planning business located on Sydney's Northern Beaches.

Our director and principal financial adviser, Darren Johns, began Align Financial in 2007.

We are a boutique practice and only work with clients where we can add significant value. By limiting the number of clients we work with, we're able to devote a tailored service that is personal, responsive, and in short, aligned.

What Can We Do For You?

Our focus is on helping individuals make smart decisions about their money.

When done well, there is so much more to financial planning than picking investments. From the outset, we help by getting your entire financial house in order and then keeping it that way, forever. This gives you a greatly simplified financial life and the gift of time by being your one point of contact for all your financial matters.

We look after your financial household and coordinate with your team of professionals including your accountant, solicitor, bank manager, real estate agent and anyone else in your financial life.

Our services include:

- Prepare for retirement
- Superannuation including SMSFs (Self-Managed Super Funds)
- Insurance and protection
- Wealth Accumulation Strategies
- Portfolio Management
- Asset allocation
- Estate planning

Your Align Financial Team



Darren Johns – Principal Adviser

Darren is a Certified Financial Planner, has a Bachelor of Science (Maths) and is a SMSF Specialist Advisor™

He is the founder of Align Financial, a privately owned financial planning business based on the Northern Beaches and is one of Australia's only Financial Life Planners.

Having spent more than 30,000 hours in the financial services industry, Darren's advice combines left-brain logic with right-brain understanding. He applies his expertise to each client, allowing them to spend their time doing the things that are important to them.

Lindsey McLellan – Client Manager

Lindsey holds a Bachelor of Social Science and a Diploma of Financial Services.

When Darren makes promises to clients, Lindsey is the person that makes sure each and every promise is fulfilled.

Lindsey has worked in the financial services industry since the late 1980s in the UK and Australia.

Her focus is on providing a reliable, efficient and welcome service for all clients so that they feel at ease with building a long-term relationship with Align Financial.

Julia Ni – Office Manager

Julia joined the Align Financial team in August 2016.

Having a background in media and administration, Julia brings a fresh set of eyes to the business, having worked previously outside the financial services industry.

Her focus is on enhancing our communications whilst attending to the day-to-day running of the business.

ALIGN FINANCIAL

YOUR MONEY • YOUR VALUES • YOUR HAPPINESS

Your Money. Your Values. Your Happiness.

Award-Winning Financial Planners on Sydney's Northern Beaches

Director & Principal Financial Adviser Darren Johns

Winner of the 2016 AFA Adviser of the Year

2016 Most Trusted Advisers