



CAROLINE BELL

FOUNDER & ADVISORY BOARD
SUMMERHILL FINANCIAL SERVICES

about caroline

Caroline is one of those unique individuals who likes both spontaneity and planning. Spontaneity is for living life joyfully; the planning is for finances to make the spontaneous possible. A setter of small and very large goals, Caroline loves order, experiencing different cultures, belly laughing with friends, hugging her family, healthy smoothies and seeing clients reach their goals. She has been running a paperless office since before it became fashionable.

businesses

Summerhill Financial Services: Caroline established full-service SFS in 2006, after having worked as a financial planner in Europe and Australia.

Summerhill Invest: she set up this robo-advice business in 2020 to make financial advice more accessible and affordable for Australians.

about her businesses

Summerhill Financial Services: a privately owned, fee-for-service, boutique financial-planning business that offers clients full financial advice. SFS has strict criteria for clients, taking only four new clients a year from the waiting list.

Summerhill Invest: an automated online investing, aka "robo-advice", business that offers financial coaching via a community membership and DIY investing.

awards

- Innovator of the Year 2020 Finalist (Women in Finance)
- Female Entrepreneur of the Year 2020 (Melbourne Business Network)
- Financial Standard Power 50 Most Influential Financial Advisers in Australia 2020



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