

CAPABILITY STATEMENT

Kellie Scott



**Portfolio Manager
Finance & Advisory**

CONTACT DETAILS

0483 183 850

The Palms, Unit 4
62 Glen Osmond Rd
Parkside SA 5063

QUALIFICATIONS

- Diploma of Finance & Mortgage Broking Management
- Certificate III & IV in Financial Services

PROFESSIONAL ASSOCIATIONS

- MFAA - Mortgage & Finance Association of Australia

Kellie is a Portfolio Manager in the Pinion Finance and Advisory team, with a background in home loans and lending services. She focuses on building strong, genuine relationships with clients, understanding their needs and guiding them to make informed financial decisions.

With experience in portfolio management and risk assessment, Kellie aims to provide the best solutions and ongoing support throughout her client's financial journey. She is dedicated to helping clients achieve their goals and grow their financial future.

Areas of expertise

- Home lending
- Relationship management
- Business development
- Finance brokering
- Project management
- Credit assessment/risk

Professional experience

- Pinion Advisory – Portfolio Manager – Finance & Advisory, 2024-present
- Accelerate Financial - Mortgage Broker, 2022 to 2024
- People's Choice Credit Union - Home Loan Specialist, 2002 to 2022

CAPABILITY STATEMENT

Relevant projects

PROJECT	ROLE	CLIENT	YEAR/S DELIVERED
Project Coordinator/Home Loan Specialist, Home Loans	Identify and collate expired home loan products and change members to current responsible lending products	Variety of members	2019-2021