

Helen Russo

CFP®, MFinPlan, ADFS(FP), Grad Dip Psych(Fin)

Helen Russo works with people at the moments when life changes, and money suddenly carries more weight than numbers alone.

She is an advocate and adviser for rural and regional families, and for women navigating major life transitions such as succession, divorce, retirement, widowhood, and inheritance. In these moments, decisions are rarely just financial, they go to the core of the person, involving responsibility, identity, and legacy.

With more than 28 years working alongside regional families and individuals, Helen's work sits at the intersection of advocacy, behavioural finance, financial psychology, and financial planning. She is particularly interested in what lies beneath the surface; the unspoken rules within families, the emotional load people carry when roles suddenly shift, and the individual and collective beliefs about money shaped by family, culture, and generations.

Helen grew up in Far North Queensland in an Italian family where reputation mattered, loyalty ran deep, and people valued straight talk. That upbringing still shapes how she works today - calm, direct, and grounded in respect for family systems and long-term stewardship.

Her own lived experiences have shaped how she serves clients, allowing her to sit steadily alongside people as they navigate life transitions. No one is ever truly ready for these moments - it is often the timing that catches people, and clients may find themselves under pressure or facing decisions they never expected to make.

People often reach out to Helen when something has shifted unexpectedly, and they need a steady, experienced voice to help them make sense of what comes next. She helps her clients slow things down, make sense of complexity, and regain a sense of agency, not rushing decisions, but walking alongside people as they think more clearly, act more wisely, and move forward with confidence.



Helen works primarily across regional Queensland, supporting families and women in communities where relationships, continuity, and connection matter deeply, alongside their professional partners, including accountants and lawyers.

She is also deeply committed to education and the development of future practitioners. Helen contributes as a Sessional Lecturer at the University of New England in Behavioural Finance at both Bachelor and Graduate levels, and as a Mentor, Trainer, and Course Writer with Monarch Institute in Vocational Finance Education.

Through her work, Helen brings together practical wisdom, deep respect for people's stories, and a clear-eyed understanding of how money, identity, family, and legacy intersect.



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ADVISORY