WealthPartners
FINANCIAL SOLUTIONS

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WealthPartners Financial Solutions is an Authorised Representative of AMP Financial Planning Pty Ltd

Accredited by AMP Financial Planning

FPA

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Why WealthPartners?

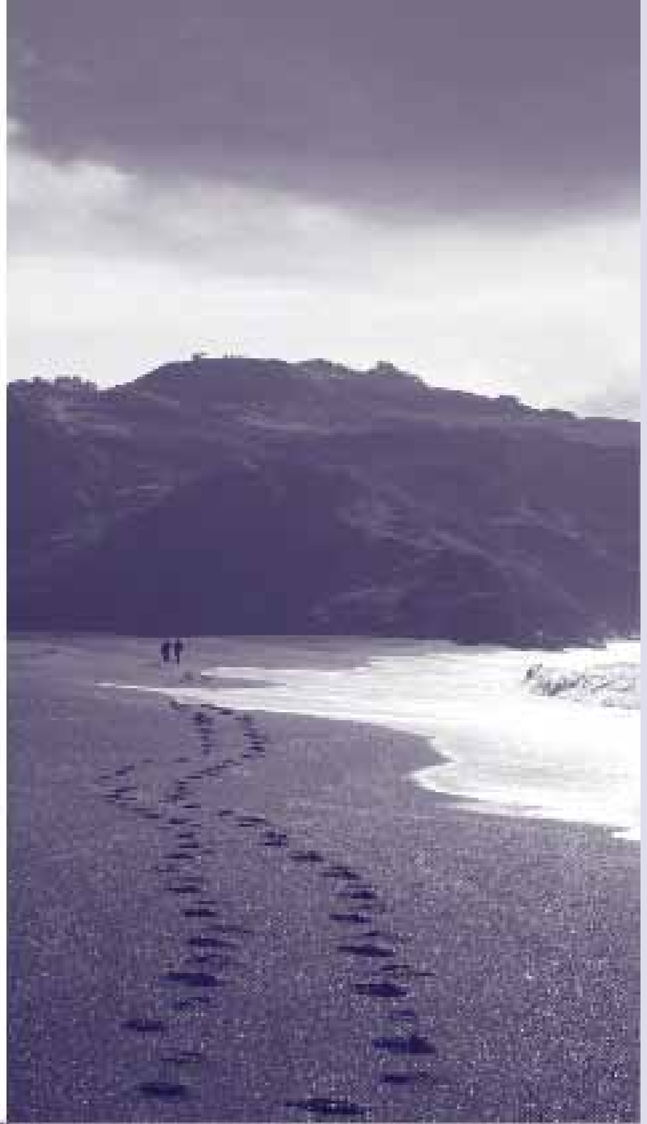
We develop long-term valued relationships with our clients, working together to build a secure financial future based on strategic advice that gives understanding, peace of mind and control. By listening, guiding and providing structure, we can support your journey to reach your financial and lifestyle goals

As specialists, we are committed to providing you with personalised service and professional advice. You will have access to dynamic quality advice delivered with integrity and your needs will be paramount.

We have specialised knowledge and access to research and market information so we can answer all of your financial questions in plain commonsense language. We underpin your goals with the technical skills required to help implement the right solutions for you. This means that you will have a knowledgeable coach and a trusted adviser, to give you confidence in your financial future.

To ensure you experience the highest level of professional attention, WealthPartners advisers have obtained or are working toward becoming Certified Financial Planners (CFP) and are members of the Financial Planning Association (FPA).

WealthPartners has the support and backing of one of Australia's largest financial planning groups, AMP Financial Planning.



'Our vision is to be recognised by our clients and our peers as the leading provider of comprehensive financial advice.'

A boutiq
of a

integrity

experience

commitment

success

Your Ongoing Journey

One of the keys to real success is in making sure there is a two way relationship with each of our clients. This means our clients need to be committed to being involved in:

- regular face to face reviews
- updating us when their circumstances change
- having a strong commitment to the plan to reach their goals and
- communicate with us on an ongoing basis.

Our services

For individuals
We know that personal relationships with our clients are the foundation to the success of our business and of our clients' financial life. With this in mind our advice is tailored to individual client values and goals.

WealthPartners Financial Solutions offer the following services to meet your financial planning needs:
- Investment Planning
- Retirement Planning
- Estate Planning
- Risk Planning
- Tax Planning

Practically this may mean advice on:
- Superannuation
- Home Loans
- Income Protection
- Borrowing for Investment
- Wealth Protection
- Personal Insurance
- Tax Effective Investing

We can manage most aspects of your financial planning needs under one roof. When you require services not currently offered by our practice we will refer to specialists in their given field, or we will work with your existing advisers to ensure services are provided in a timely and effective manner.

For Businesses
We have had many years experience in advising and working with large and small businesses across many industries and can help develop innovative strategies to ensure that your business objectives are met.

WealthPartners Financial Solutions can assist your business in:
- Meeting superannuation requirements
- Structuring and developing employee benefit programs
- Developing salary packaging arrangements
- Issue critical advice around key person, succession and buy/sell risk management solutions

Going the Extra Mile
We believe in the importance of keeping you informed and motivated to reach your long-term goals. All WealthPartners clients have access to regular reviews, financial communications, industry information as well as invitations to relevant events and seminars and much more.

'Our mission is simple - to make a positive difference in our clients' lives by providing innovative and cost-effective financial strategies'

Identifying your life stage

We understand that financial goals and priorities will differ depending on your life stage. WealthPartners work with you to reach your current and long-term goals by tailoring advice to the appropriate stage of your life, whilst planning for future years.

Young & Single

First job and first solid income.
Debt management, credit cards, budgeting, income protection, paying rent, saving for home deposit, first investments.

Relationship

In a serious relationship, greater career demands and prospects, first home mortgage.
Debt management, budgeting, renovations, investment strategies, income protection, lifestyle expenses.

Young Family

Young children, single or reduced income.
Superannuation strategies, children's education, debt management, investment strategies, government allowances, lifestyle expenses, family expenses, estate planning, wealth protection, retirement goals.

Empty Nest

Possible peak of career earnings, reduced debt, more lifestyle opportunities, adult children to support.
Wealth creation, maximising superannuation, investment strategies, lifestyle expenses, estate planning, transition to retirement.

Retired

Ceasing or reducing paid work, downsized home, less financial commitment, more lifestyle opportunities.
Superannuation and pensions, managing income, lifestyle expenses, medical expenses, estate planning, care and living expenses, government support.

goals

advice

distinctive

logical

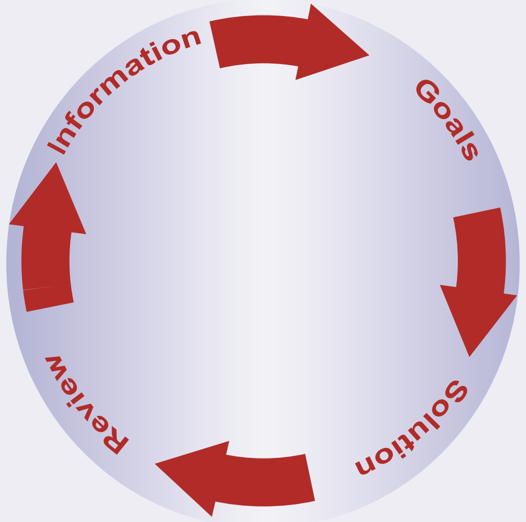
'Helping you enjoy a better life by identifying your values and goals and developing clear financial strategies to achieve them'

Tracking Your Pursuit to Goal

As you progress through life your goals and circumstances change. It is therefore vitally important to the success of your financial plans that we regularly monitor and review the strategies together to ensure that you are still on track to meet your goals and objectives.

A strategic review provides us with the opportunity to make sure that our understanding of your individual circumstances is up to date.

There are various types of reviews available. We can work with you to develop a regular review program tailored to your particular needs.



Your pathway with WealthPartners

Benefits of Financial Planning

Financial Planning is about making a commitment to your long-term financial well-being. By engaging with WealthPartners we can guide you through the financial planning process which in turn will provide the following benefits:

- Give direction and meaning to your financial decisions
- Help protect and build your income or investments
- Assist in planning for major life changes e.g. retirement
- Allow you to identify your end goals and whether they are achievable
- Provide a sense of security and peace of mind that you are on track to meet your financial goals

Seven steps to your financial future

1 **Initial Meeting** involves a consultation, usually in our offices

2 **Information Gathering** where we collect all the relevant information needed to prepare a plan

3 **Identifying Goals** to help you realise your financial goals and objectives

4 **Develop Your Financial Plan** by considering strategies and relevant issues before formulating our written recommendations

5 **Present and Explain Your Financial Plan** at another meeting to discuss our recommendations with you

6 **Implementation** with your approval to proceed with the agreed recommendations

7 **Reviews** are conducted regularly of your objectives, financial situation and needs

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large financial institution