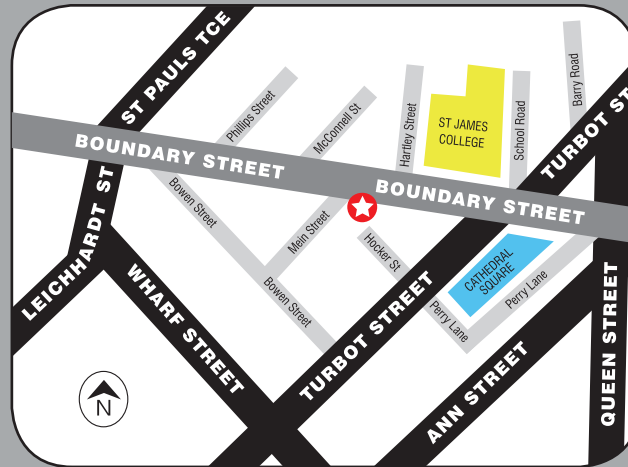




OUR 5 STEP PROCESS

Take your first steps to securing your financial future

- Step 1 Establish your goals and objectives**
An initial consultation will be arranged. This allows us to find out about each other. We will collect all the information we need from you to help identify your goals and current financial position.
- Step 2 Develop a strategy to meet your needs**
We will consider the 7 building blocks or strategies (eg. Tax, social security, estate planning etc), then develop and present you with written recommendations in a financial plan (often referred to as a Statement of Advice)
- Step 3 Make Recommendations**
We will discuss the recommendations with you and make sure you have a clear understanding and are comfortable with the path we need to take.
- Step 4 Implement Recommendations**
We will implement all recommendation once the Statement of Advice has been signed off.
- Step 5 Review your goals and current situation**
We will periodically help your review your objectives, financial situation and needs.



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“Secure Your Financial Future”

OUR PHILOSOPHY

Change occurs everywhere, everyday, all the time: change is constant. Financial market performance and events show us that all the time. At **Securinvest Financial Services** we see change as providing opportunity.

Those who have developed clear strategies for seeking out and developing opportunities as they arise will be the future winners. **Securinvest Financial Services** works closely with clients to identify and develop these opportunities.

Securinvest Financial Services provides you with the information, tools, processes and guidance.

WHAT WE DO

We build, manage and protect client's wealth. We partner with clients to establish their financial objectives, provide ongoing education and secure their financial future whilst delivering quality advice and service.

CLIENT VALUE PROPOSITION

We build, manage and protect clients wealth. We partner with our clients to establish their financial objectives, provide ongoing education and secure their financial future whilst delivering quality advice and service.

OVERVIEW

Securinvest Financial Services is a privately owned boutique financial advice and education firm. We have a successful 25 year history and employ a professional and experienced team, which is rich in hands-on experience and grounded in theory.

Our goal is to work with our clients with whom we can build a strong relationship through objective planning and advice. **Securinvest Financial Services** has the capacity and proven experience to provide innovative solutions, delivered with passion, integrity and commitment.

Securinvest Financial Services adopts a multi-dimensional approach to ensure clients achieve financial security by offering advice in relation to:-

- Full Financial Planning
- Pre and Post Retirement Planning
- Social Security Planning
- Debt and Tax Planning
- Personal Insurance
- Wealth Protection
- Salary Packaging
- Investment Advice
- Banking and Loan Solutions

Clients using our process need not fear the threat of financial 'insecurity'. Adhering to fundamental and sensible investment principles, backed by the experience, stability and security of strong recognised brand names provides peace of mind for our clients.

OUR LICENSEE

Australian Financial Services Limited (AFS)

AFS was established in 1995 by advisers, directors and staff.

We believe that the AFS structure provides clients with the confidence and security that business decisions are made with you the client in mind.

AFS is the holder of Australian Financial Services Licence number 297239. Under the Corporations Act, our primary responsibility is to you, our client. We engage Authorised Representatives to act on our behalf when dealing with clients and AFS is ultimately responsible for the advice given.

OUR REFERRAL PARTNERS

We have been providing financial planning services to a growing portfolio of strategic partners for over 25 years.

Our Key Strategic Partners include:

- Professional services firms (such as accountants and solicitors).
- Finance Brokers
- General Insurance Broker
- Private Banking Specialist

