Achieve Your Financial Goals

Corporate Brochure

wealthseekers
www.wealthseekers.com.au

Welcome to intelligent, affordable financial advice

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Our Vision

Our Vision is to make financial advice human and accessible.

At Wealth Seekers, we are dedicated to providing all our clients advice that will improve their personal wealth.

Our Mission

At Wealth Seekers, we have a mission to be Australia's most trusted and respected provider of financial advice.

To achieve this, we have cultivated a team of highly competent professionals to consistently deliver intelligent and affordable financial strategies and solutions. Through our dedication to delivering exceptional service and value to our clients, we aim to inspire, educate and share knowledge with you along every step of the way.

About Us...

Wealth Seekers began with the simple idea that intelligent advice can be delivered to our clients in an affordable way.

As a company, we are comprised of a dedicated group of professionals with a wealth of experience across a broad range of integrated professional disciplines. Through a cohesive approach to delivering financial strategies and solutions, we strive to achieve the best possible results with the greatest possible efficiency.

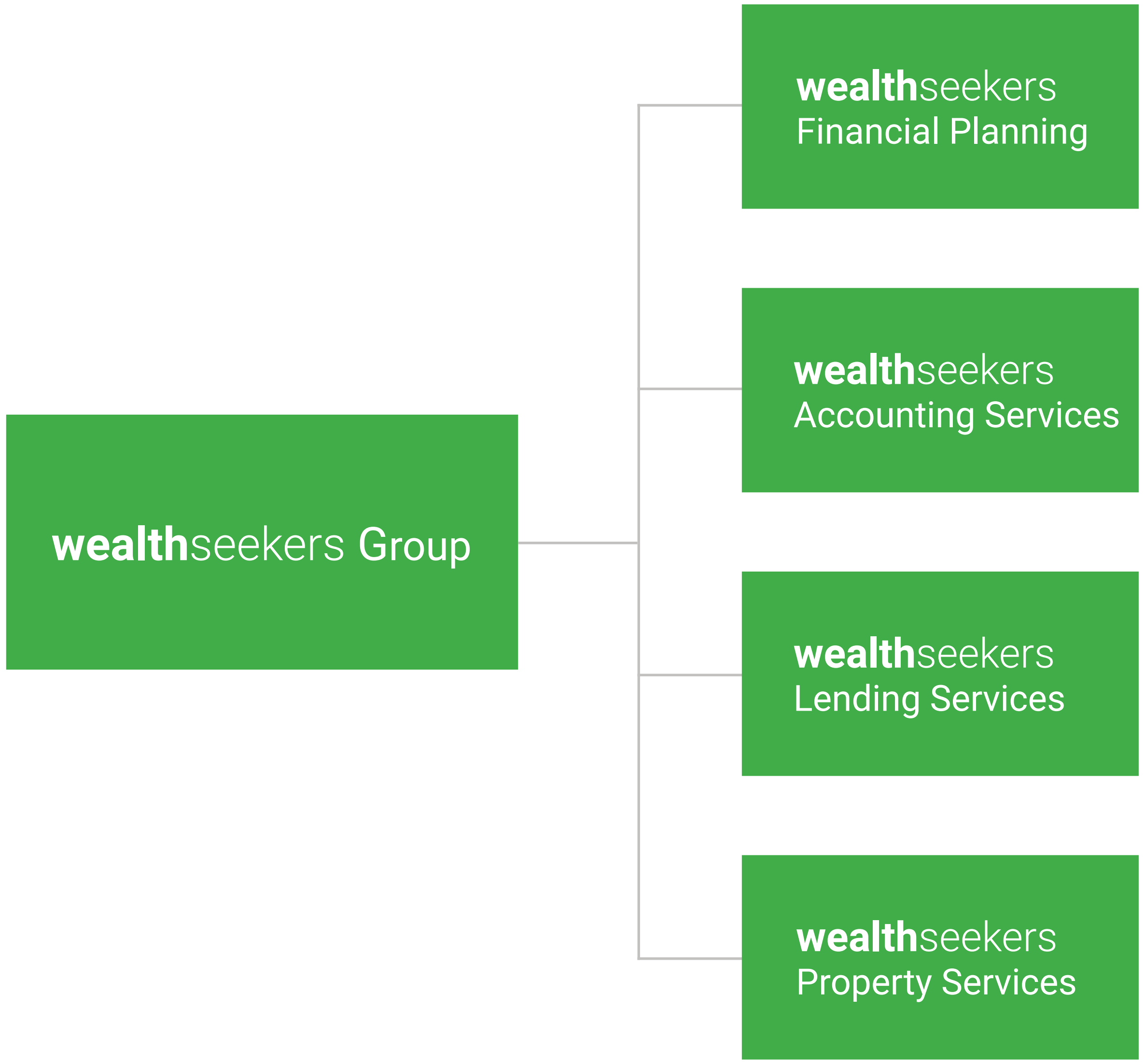
By focusing on the needs, goals and objectives of our clients, we have developed a collaborative process of delivering tailored advice which ensures that our clients remain educated, informed and in control of their financial direction along every step of the way.

Our aim as a business is to build trusted, long-term relationships with our clients by providing ongoing professional support, guidance and advice to help them create wealth now and into the future. It is our hope that financial security, success and prosperity become synonymous with the notion of being a Wealth Seekers' client.

If you're ready to make a positive change to your finances, we look forward to working with you to build your personal wealth.

Adrian McPhee & Ryan Wood

Company Structure



By taking a holistic approach to assessing and planning your finances, you have the comfort of knowing that all aspects of your finances will be handled by an integrated group of professionals working together under the one roof.

We have the experience, knowledge and expertise to help you achieve your financial goals and objectives sooner.

Take Control!
Welcome to Wealth Seekers!

Our Approach..

We provide our clients with the right financial services and strategies to improve their overall financial position.

It all begins with you as the client and helping you to determine your needs, goals and objectives. Your Adviser is your central point of contact who prepares, presents and coordinates the implementation of your financial plan while maintaining a consultative relationship with you at all times so that you can make the decisions along the way.

A common challenge faced by many Australians is trying to work through the myriad of financial options on their own. Wealth Seekers offers everyday Australians the ability to take control of their financial direction and integrate their personal finances in a holistic way.

Client → Adviser

- Financial Modelling
- Managed Investments
- Superannuation & SMSF
- Banking & Finance
- Property Research
- Personal Insurance
- Taxation & Accounting
- Estate Planning

Areas of Expertise

- Cash Flow Management
- Investments
- Debt Management / Structures
- Tax Strategies
- Superannuation / SMSF
- Risk Management
- Estate Planning
- Accounting

Holistic Plan

Wealth Seekers is committed to providing an integrated approach to improving your finances by giving you access to a team of highly qualified professionals who work together with your Adviser to develop and implement your financial plan.

Our objective is to organise and coordinate the improvement of your financial position in the areas of Investments, Debt Management, Tax Strategies, Superannuation, Risk Management and Estate Planning.

"Achieve a better return on your effort by gaining financial certainty, clearing financial blind spots, building long-term wealth and real security...."

Integrated Professional Services

- Investments
- Debt Management
- Tax Strategies
- Superannuation
- Risk Management
- Estate Planning

Advice Process

First Consultation
Discuss Goals, Important Information, Financial Strategies and Options, Basic Fact Find

Initial Research
Adviser to collect up-to-date information, collate supporting documents, examine strategy options with full information at hand.

Second Consultation
Adviser to outline scope of advice and broad strategic direction of financial plan, disclosure of specific costs involved, clients to sign letter of engagement.

Financial Plan Preparation
Adviser to conduct full financial modeling to demonstrate the strategic outcomes achieved from implementing the range of recommendations.

Third Consultation
Adviser to present Statement of Advice to clients which includes a detailed explanation of strategies, products and financial outcomes

Implementation of advice
Scope of advice determines what this will entail, but it usually involves signing application and rollover forms and/or signing off on other legal documentation.

Follow-up and Ongoing Support
After we deliver your plan, we schedule a follow-up meeting to see what questions you have on the plan and if you need any further assistance.

Memberships, Associations & Professional Partnerships

Wealth Seekers has a team of professionals and industry partners who are fully qualified to provide advice and deliver a holistic range of financial planning, accounting, lending and property services.

Financial Advice
- Cash Flow Modelling
- Investment Advice
- Superannuation Advice
- Self-Managed Superannuation Funds
- Personal Insurances

Accounting
- Tax Returns
- Tax Variation Forms
- SMSF Administration
- Depreciation Schedules

Mortgage Broking
- Home Loans
- Investment Loans
- Debt Structuring
- Debt Consolidation
- Re-Financing

Legal Services
- Wills
- Power of Attorney
- Trusts
- Conveyancing

Property / Real Estate
- Property Research
- Nationwide Reach
- Data Driven Analysis
- Range of Dwelling Types

Property Management
- Property Management
- Location & Tenant Screening
- Rental Appraisals
- Regular Property Inspections

C&I Ombudsman Services Limited (COSL)

FAQ's

Q. How does Wealth Seekers compare with other financial planning firms?

A. We believe that the quality of financial advice should be measured on three key criteria: (1) cost; (2) professionalism; and (3) the appropriateness of the advice you are receiving. At Wealth Seekers, we aim to provide tailored advice to our clients at an affordable price whilst always endeavouring to exhibit the utmost professionalism. This is how we measure our success as a financial planning firm and you should feel satisfied that we have delivered in each of these key areas.

Q. What are the costs associated with obtaining financial advice?

A. There are no costs involved with your initial consultation. Your Adviser will outline the costs involved with preparing and implementing your Statement of Advice prior to you agreeing to proceed with Wealth Seekers as a client.

Q. Are all the advisers and associated companies that I am dealing with properly qualified?

A. Yes, every Adviser at Wealth Seekers is qualified to provide financial advice under Australian law and all associated companies are licensed within their respective industries by the relevant regulatory body(s).

Q. How long will the financial advice process take?

A. In most instances, it takes between two to eight weeks for your financial plan to be prepared, presented and implemented so that your strategy comes into effect.

Q. Once our financial goals and objectives are clear, what is the next step?

A. To put a financial plan in place. This is done by preparing a Statement of Advice which will outline your recommended strategy in detail and the right financial products for you to use. Once you are comfortable with everything that has been outlined, your Adviser will coordinate the implementation of your financial plan. This will begin the process of you progressing forward towards a better financial future.

Looking to find a better way to build your personal wealth?

We have the experience, knowledge and expertise to help you achieve your financial goals and objectives sooner.

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