Fusion Planning Group ABN 92 116 751 127
Corporate Authorised Representative of WealthSure
Corporate Authorised Representative No. 297945
Suite 4, 12-14 Thelma St
WEST PERTH WA 6005
Phone: 08 9485 1700
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Corporate Profile

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Who are Fusion Planning Group?

Fusion Planning Group differentiates itself through its comprehensive approach to advice, offering, integrated financial solutions. Through our highly consultative approach we blend together a range of financial services required by the client and their families over their lifetime. We recognise that some clients' needs may be met through products and some through services. These services are then delivered through a dedicated team of professionals focused on exceeding the expectations of the clients and their families.

Solution Based Advice

Fusion Planning Group provides comprehensive advice that is based on the needs and objectives of its clients. This includes advice pertaining to financial strategies, asset allocation, investments, taxation structures, cash flow and debt management, estate planning, risk management, superannuation, gearing and meeting lifestyle goals.

Objectivity

Fusion Planning Group is not owned or controlled by a funds management firm, investment house or banking institution. Our service offering is therefore not influenced by the practice of distributing (selling) manufactured investment products to its clients. As a result, the advice that is given is only for the benefit of the client.

Our Corporate Values

The qualities we stand for – attaining excellence …

Trust
At Fusion Planning Group we look out for our clients' best interests, and get to know them thoroughly to enable us to develop the best strategies to help achieve their goals.

Technical Excellence
Ensuring qualifications are constantly updated is a minimum requirement at Fusion. We participate in National competitions, keep up with legislative changes, and read the financial press so we stay informed.

Relationships
Fusion Planning Group has a natural affinity for client rapport and is committed to the sustainable development of our advice process. We aim to provide trusted personal relationships in the delivery of our services to our clients.

Reputation – Integrity is absolute
Fusion Planning Group has a solid reputation for valued advice and services based on integrity, professionalism, compliant and ethical behaviour.

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Our Value to You

At Fusion Planning Group, our aim is to assist you in achieving your financial life goals and dreams. Your ability to achieve these is closely connected with having a plan; once you know what you want in your life you need to identify the steps to get there before you can reach your goal. Whatever your life plans, finances will play a key role in reaching your goals.

By contacting us, you have already taken a step in the right direction.

How can Fusion Planning Group help you?

Everyone has financial needs, but many people don't think about what their long term needs are in the context of their overall lifestyle. It is often only when a significant event, such as a change in job or home, retirement or redundancy looms on the horizon that we think about our finances and whether they are adequate to meet our needs.

Fusion Planning Group advisers know that this is the case for many of us. Our aim is to show you the value in identifying your goals and dreams and then making sure your financial strategies are in place to support them.

Our approach to financial advice makes the process of identifying and achieving your goals simple and clear; we then work with you to develop strategies to support these goals. Our aim is that you will fully understand:

- What strategies we are recommending and why
- How these strategies will assist you in achieving your goals
- What you are paying for your advice
- What you will pay for implementation of our recommendations
- Our ongoing service to you

What can Fusion Planning Group provide?

The advice that we offer is tailored to each of our clients, therefore the strategies that we recommend to you will be uniquely suited to your individual needs.

The process that we take to develop these strategies and implement your plan, however, is broadly similar for all our clients.

Step 1 – how can we help you?
We have provided you with a simple questionnaire to identify your key current and future issues that will assist us in our initial meeting. Please complete and return to us in the pre paid envelope provided prior to our confirmed appointment.

At our initial appointment we will spend some time getting to know you and your goals and dreams. This will assist us both in determining whether we can work together to assist you in achieving these goals.

Step 2 – getting all the facts
Following our initial meeting, if we agree that we both wish to move forward, we will provide you with a questionnaire which we ask you to complete as much as possible so that we have all the background information we need that we did not cover at our initial appointment.

Step 3 – strategy development and presentation
Once we have all the relevant information, this is where we can really help you in planning for the future. By understanding what you want to achieve in life and how far you are towards achieving those goals, we can then use our expertise and resources to develop the strategies that will ensure you get where you need to be.

During the first two steps we'll outline some of our thoughts and give you a clear idea of what we will be considering in developing the strategies for you. We'll also let you know the time frame for presenting our recommendations to you and cost of providing our recommendations.

Our recommendations will be provided in the form of a 'Statement of Advice'. This will include not only full details of the strategies we recommend but also full information on implementation approaches, strategies considered but rejected and the cost to you to implement the recommended approach.

Step 4 – Implementation
Once we have reviewed the strategies together and you have indicated you are happy to proceed, we will then set out an implementation plan. Again, this provide a clear guide to what we are going to do and when, and the associated costs.

Step 5 – Ongoing service
Developing and implementing your financial plan is not a one off event – it is an ongoing process which evolves as you review and refine your needs and life goals. At Fusion Planning Group we aim to ensure that not only are you satisfied with the initial advice and financial strategies that we give you but also that you are confident your financial plan will continue to meet your lifestyle needs.

That's why we provide an ongoing service to our clients; to ensure that our advice does not stop with the implementation of our recommendations.

Once your financial plan has been put in place, it is important that you continue to receive information about any changes to your investments and that we regularly review your plan to ensure that it is still meeting your life goals and current needs.

How much does it cost?

Because our service is unique to you and depends on your personal circumstances, the fees we charge will vary in amount. They will be clearly outlined in the documents that we present to you and we will give you an indication of the expected cost to you during our initial meeting.

Our objective is that you not only understand how much you are paying, but also what you receive for your money. Our fees essentially fall into three categories:

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- Advice fees
- Implementation fees
- Ongoing service fees

Advice fees
Our advice is the key service that we provide to you; the projected outcomes of this advice will be presented to you in the Statement of Advice. There is no charge for our initial meeting, where we establish if we can develop an ongoing relationship, however once we reach 'step 2' we will let you know the cost of us providing advice to you. This fee will be payable regardless of whether you implement some or all of our recommended strategies.

Implementation fees
Our strategies may recommend that you purchase certain products or services from a range of providers. If you accept these recommendations fees are charged to meet the cost of establishing products and services on your behalf. These will be clearly set out in the Statement of Advice.

Ongoing service fees
As we have outlined above, ongoing service is an essential part of our relationship with you. As part of our recommendations we will discuss the level and types of ongoing service which are suitable for your needs. We will provide full details of these and any costs associated with them in the Statement of Advice.

What do I need to do now?

If you would like to know more please contact us 08 9485 1700 for further information.

Where Are We?

Fusion Planning Group Pty Ltd
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