

A Lifetime of Financial Care



A member firm of Genesys Wealth Advisers

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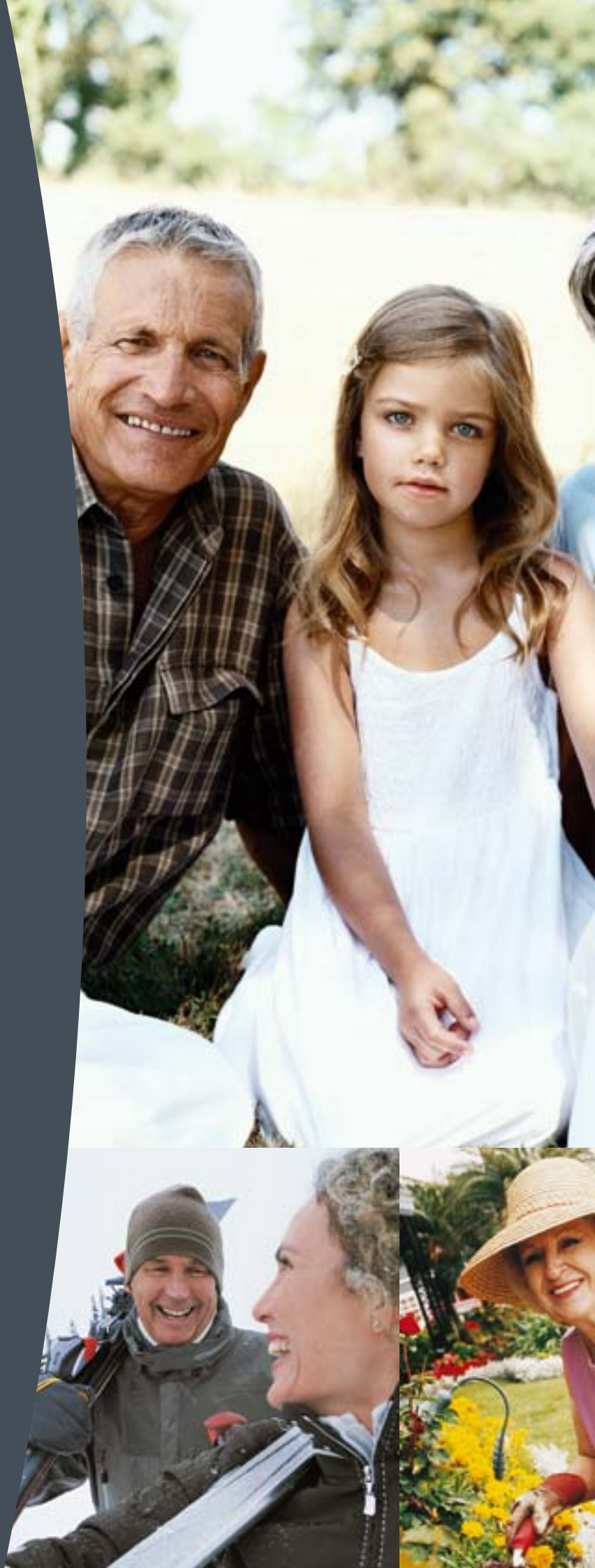


A Lifetime of Financial Care

We, the team at Foundation Wealth Advisers pride ourselves in providing a personalised and professional service to you, our clients. Whether you are just starting your working life, going through one of life's many challenges, getting married, having children, purchasing a home, going through a redundancy or retiring, we are here to help you understand and make the most of your situation.

We care; we genuinely understand the magnitude of financial decisions; and we will take the time to work through your concerns *with you*. We take an interest in you and your family, and we are there for you whenever you need our help.

- ✓ We will take the time to listen, know and understand *your* needs.
- ✓ You can have confidence and trust that your problems will be solved in a way *you* understand
- ✓ We will give you a roadmap for your financial future, offering solutions and giving clarity and direction.
- ✓ We are thorough in everything we do, alleviating your stress and concern.
- ✓ You will never feel like a number. Our relationship is with *you*, not a file.
- ✓ We build our business on ongoing relationships. We will help you to feel relaxed and confident at all stages of our dealings.





Our services to you

We help you make smart decisions about your money. We achieve this through a tested and successful process – the creation of your own wealth plan.

The key to an effective **wealth plan** is to analyse and integrate all aspects of your financial situation to ensure they are synchronised and working efficiently towards achieving your goals.

Our comprehensive wealth planning process would commonly include

Making it

Your income plan would provide strategies to improve your cash flow through a combination of tax effective measures and the efficient use of your income. The resulting surplus funds are then used to create wealth.

Leveraging it

Your debt plan would analyse your current debt structure and would determine the role debt can play for you in building your wealth.

Growing it

Your investment plan would explore the different options available to you and applies the income plan and debt plan analyses to help you achieve or exceed your goals.

Protecting it

Your risk plan would analyse your financial needs in the event of a setback to your most important asset, your health. It would seek

to identify and where possible mitigate your exposure to financial stress in the event of an inability to earn income. Getting the right level and type of insurance in place is critical to reducing your financial risk.

Enjoying it

Your retirement plan would identify your income needs in retirement and the level of assets required to provide this income. We would work with you to achieve and sustain the lifestyle you desire.

Disposing it

Developed in conjunction with your solicitor, who will draft any required documentation, your estate plan would help articulate your wishes in the event of your death and determine a strategy to provide your family with funds in a tax effective manner and with asset protection as a priority.



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Our Advisers

Our advisers, Mark Hudson and Stuart Bale, provide a range of wealth advice and assistance to help people grow, manage and protect their wealth.

We can help you create the financial security that lets you focus on what's really important.



Mark Hudson



Stuart Bale

Mark and Stuart are supported by the Client Care Team

Our specialised administrative support team are an integral and highly valued component of the financial planning team. They specialise in supporting you, ensuring that your information is treated with security, integrity and efficiency.

'We aim to make our clients' experience a comfortable one.'

What our clients say

The success of our business is largely due to referrals from our existing clients. A referral from friends and clients pleased with the service we provide is the finest compliment we can receive.

"Always ready to help me, and friendly."

"Competence in everything they do."

"Compassionate – they go the extra mile."

"They remember the personal things – I feel like a person, not a number."

Very supportive, responsive and efficient."



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