Ellingworth Pearce & Associates...

Providing guidance
through life's changes.

Consultum
Financial Advisers

"Preparation is everything. Noah did not start building the ark when it was raining."
Warren Buffett U.S. C.E.O. of Berkshire Hathaway

Planning for the future...

Your financial goals are as individual as you are. So it's vital to have a tailored comprehensive financial plan that will help you achieve and maintain your ideal level of wealth, taking into account your needs and lifestyle.

A financial plan is a personal road map that helps you reach your financial goals, via a route that's just right for you. Of course, it can also help you negotiate and remain stable through any twists and turns of the market because your investment and protection strategy is based on your own situation and goals and not outside influences.

Ellingworth Pearce & Associates researches, develops and manages a range of strategies to help you achieve your financial goals. We work closely with you to gain an understanding of your financial needs and provide quality advice that is simple to understand. We value results, not activity. Above all else, we are committed to helping you grow and protect your wealth and secure your future.

At Ellingworth Pearce & Associates we charge a fee-for-service, where all the fees you pay are agreed to in advance before any personal advice is given. This means you know up-front how much our advice will cost and you can be sure that there are no hidden fees.

Our ongoing service package is designed to suit your needs. The features have been created to suit the demands and complexity of your situation.

These services may include:

- Ongoing face to face meetings with your Adviser.
- Formal review of your portfolio and financial plans, including valuation and asset allocation reporting, providing strategies and recommendations in relation to changes to your investments where appropriate.
- Regular contact by phone, fax or email to update your portfolio requirements or address any concerns you may have.
- Access to your financial adviser and support staff via phone and email.
- Newsletter, market commentaries and economic updates.

The importance of quality financial advice...

Our Advice Process

The key to our advice process is a full understanding of your circumstances and goals. We spend time with you, guiding you through a series of steps to ensure the strategies and recommendations we make are right for your individual needs and objectives.

Step 1 Work out where you are today.

Step 2 Define what you want to achieve.

Step 3 Consideration and strategy development.

Step 4 Creation and implementation of your financial plan (as agreed by you).

"Ellingworth Pearce & Associates is a uniquely structured and dynamic Financial Planning Practice, offering tailored solutions for your financial needs. We have built a strong reputation for delivering sound advice to our clients who seek more than the standard off the shelf services".

We never stop getting to know you...

We understand that this is only the beginning. This is why we place great emphasis on maintaining a close relationship with each of our clients, because we understand your situation is unlikely to stay the same forever. Regular reviews make sure your plans keep pace with the changes in your life, and remain in line with your long-term financial objectives.

You can be assured that we will maintain regular contact with you to keep you up to date with market conditions and your portfolio position.

Our loyal client base is testament to the importance we place on the ongoing partnership and high level of satisfaction we achieve.

We have over 100 clients who have been with us for over 10 years. We continuously strive to keep them - and you - in touch with the latest developments and issues affecting their financial plan.

Ways we can help

Ellingworth Pearce & Associates is a uniquely structured and dynamic Financial Planning Practice, offering tailored solutions for your financial needs. We can navigate you through the complexities of Wealth Creation and Superannuation and we pride ourselves in providing innovative financial life strategies, not just financial advice. Our focus is on working in partnership with you over the long term to enable you to reach your financial goals and secure your lifestyle. You can rest assured that your finances are being looked after by a team of experts with over 50 years of collective experience.

"A man who does not think and plan long ahead will find trouble right at his door."

Confucius

Your Financial and Lifestyle Goals	Our Process, Guidance and Experience
Wealth Creation for financial independence	Budgeting, Savings plans, Gearing, Salary Sacrifice, TTR, Debt Management
Control over your investment structure and choices	SMSFs, Administration Support, Access to Direct equities and property consultants
Diversified portfolio	Professional guidance, in depth research, professionally structured Model Portfolios that match your risk profile
Comfortable retirement	Retirement Gap Analysis, Salary Sacrifice, TTR, Tax minimisation
Maximise Centrelink benefits	Assistance with applications, Strategic Advice
Planning for the inevitable	Wills, Testamentary Trusts, Powers' of Attorney, Binding Nominations
Protecting the financial wellbeing of your family	Protection for you and your family from the financial implications of a critical event such as death, serious injury or illness
Protecting your business	Key Person Insurance, Buy/Sell Agreements

Our Team of Specialists...

Ellingworth Pearce & Associates uniquely focuses on maintaining a team of specialist financial advisers who have in-depth industry knowledge and superior skills and experience.

As a client you can expect open, honest and direct communication and advice.

Roger Ellingworth
Managing Director, Senior Financial Adviser
MBus (RMIT), CFP®, Dip FP
Authorised Representative

Roger has been in the financial planning industry since 1983 with experience in all aspects of Financial Planning. Roger has predominantly specialised in Retirement Planning. Along with the responsibilities of the strategic direction of the practice and management of staff, Roger's primary role is to assist clients in achieving their financial and lifestyle goals in retirement.

Darryl Pearce
Director, Risk Specialist
Authorised Representative

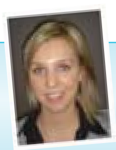
As a Director, Darryl is heavily involved in the strategic planning and management of the practice. After a number of years offering clients a broad range of financial advice, Darryl chose to specialise in Wealth Protection and Risk Management. Darryl has significant experience in analysing and finding solutions to Personal and Business Risk Management needs. Darryl has been providing financial advice to his clients since 1990.

Samantha Hawkins
Relationship Manager,
Senior Financial Adviser, CFP®, Dip FP
Authorised Representative

Samantha's role as Relationship Manager is central to our relationships with our clients. For most clients, Samantha is the primary point of contact. Samantha is able to assist clients with a broad range of financial planning needs, referring to others for their specialist advice when appropriate. Samantha has been in the financial planning industry since 1995 and is a Certified Financial Planner.

Taking control of your finances could be one of the most important things you'll ever do for yourself and your family.

Danielle Seymour
Administrative Support /
Personal Assistance



Justine Alessi
Administrative Support /
Personal Assistance

Danielle and Justine's roles cover a variety of issues ranging from assisting in the preparation of Statements of Advice, preparing portfolio reviews for our clients, and supporting clients and Financial Planning staff with administration issues such as applications amendments and withdrawals.

It's time we talked…
Now you can plan for your financial future with confidence.

Ellingworth Pearce & Associates offers you a complete financial solution with the choice and expertise you need to grow and protect your money.

For more information about our services or to arrange an appointment with one of our skilled professionals who are committed to supporting you through your financial journey, please contact us for a complimentary, no obligation consultation:

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