

Entello Group is an independent financial services company geared to helping Australians increase their personal wealth and achieve financial security.

We believe financial management is a personal responsibility and our goal is to provide the expertise, tools and support to enable our clients to take control of their own financial destiny.

Our philosophy encourages direct investment in all major asset classes and adheres strictly to a fee-for-service policy which ensures transparency.

We offer financial planning that is conservative, yet effective, employing strategies that combine education with personal wealth creation opportunities.

Entello's customised **Personal Financial Management** gives access to comprehensive, ethical and results-driven investment advice and guidance aimed at achieving financial independence and understanding. Qualified, professional advisers review and analyse your situation and goals and discuss potential investment strategies. We then work with you to develop a personalised plan that will guide your investment decisions and allow you to capitalise on future opportunities.

If you are looking to consolidate and grow your wealth and guarantee your financial future, contact the team at Entello.

To help you take control of your own financial destiny we offer:

- Personal Consultations
- Financial Plans
- Annual Financial Reviews



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Personal Financial

MANAGEMENT

What is an Entello Financial Plan?

An Entello Financial Plan is a blueprint or map specifically designed to help you achieve your financial and lifestyle goals.

What is included?

The plan is always personalised so the content may vary substantially. However the list below provides an indication of the content that may be analysed, reviewed and presented in your financial plan:

- Existing assets & liabilities
- Personal budget
- Appropriate loan structures
- Superannuation
- Investment property purchases
- Retirement planning
- Investment strategies & options analysis
- Share portfolio construction & analysis

Who is my adviser?

At the heart of Entello is a team of professional financial planners. Our carefully selected and fully accredited staff members bring a high level of expertise, along with a hands-on approach and commitment to achieving outstanding results for our clients.

How is a plan developed?

An initial consultation with an Entello Financial Adviser will review your situation and discuss your investment options. If a plan is appropriate, a full proposal will be provided suggesting between one and three possible strategies.

Entello financial plans take into account your personal circumstances. Your specific details are overlaid onto a series of financial models which estimate future asset values and passive income streams.

How often should the plan be reviewed?

The Financial Plan should be reviewed annually to take into account changing personal circumstances and wider economic influences. Your Planner will discuss a suitable review period with you.

How much will a consultation cost?

An initial consultation with a qualified financial planner will cost \$346.50 (inc. GST) for the first hour and \$110 (inc. GST) per subsequent hour or part thereof.

Where can I get more information?

Visit our website: www.entellogroup.com.au;
email admin@entello.com.au; or call 1300 246 837.

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