

THE WEALTH MANAGEMENT SPECIALISTS



**PROSPERITY**  
PARTNERS





ACHIEVE FINANCIAL



PROSPERITY  
PARTNERS



FREEDOM

## PROSPERITY PARTNERS STORY

Prosperity Partners offers solutions for all your financial needs.

We provide a comprehensive range of services from financial planning, portfolio management, risk insurance advice, direct shares, self managed superannuation, business succession advice and estate planning.

Since inception, Prosperity Partners has accumulated a wealth of experience, skills and an unwavering commitment to create workable yet innovative financial solutions for our clients.

Our advisers provide comprehensive, professional and personalised services to help you achieve financial freedom.

We work in partnership with our clients to establish where they are now, what they want to achieve in the future and what they need to do to turn their financial goals into reality.

[www.prosperitypartners.com.au](http://www.prosperitypartners.com.au)

“ *To be the most respected provider of personal and corporate financial solutions in our industry.* ”

## Uniqueness

We have carefully structured our internal operations to provide solutions for all your financial needs.

This means you don't have to spend time dealing with numerous suppliers. Our integrated financial solutions ensure ease of monitoring and peace of mind to keep your financial goals on track - simply.

Additionally we have carefully selected and aligned our business with a number of highly respected external alliance partners that assist us to exceed our responsibilities to our customers, employees and community in which we operate.



## The Importance of Seeking Professional Advice

A secure financial future starts with a smart financial plan.

By speaking with a financial adviser, you can make the right financial choices based on your personal situation, your needs and your goals.

## Our Clients

Prosperity Partners provides financial services to businesses and individuals. Through our unique suite of services coupled with the quality of the advice provided by our adviser team, we pride ourselves on the high level of repeat business and referrals we continually receive from our existing clients.

“ *To fulfill the lifetime financial goals of our clients.* ”



# WHY CHOOSE PROSPERITY PARTNERS

## Skilled Advisers

All Prosperity Partners advisers are employed on the basis of their financial aptitude, industry qualifications, experience and demonstrated business acumen. They are also selected for their ability to understand your specific requirements and their ability to explain complex information.

Supported by excellent research, our advisers have a thorough understanding of financial markets, investment and insurance products, superannuation, tax and social security.

## Professional Reputation

Given the depth and quality of experience within our adviser team, we are proud that Prosperity Partners is highly regarded by our peers and clients.

## Total Quality Management

Prosperity Partners is committed to the continuing professional development of its advice team. We regularly attend research briefs by specialists, ensuring we are up-to-date with the latest financial and regulatory legislations.

## Extensive Suite of Services

We can assist you by providing advice on all your financial needs:

- personal financial planning
- risk management (life insurance, trauma insurance, income protection)
- business succession
- tax planning
- superannuation (personal, self employed, corporate, self managed funds)
- estate planning
- direct shares
- portfolio management
- general insurance (commercial)
- accounting
- finance (personal and commercial)

## Quality Advice and Personal Service

It is our philosophy that the best financial advice is the kind that continues long after your investments, insurance or superannuation is established.

Prosperity Partners offers clients a wide variety of review options depending on individual circumstances, providing peace of mind in knowing your individual financial plans can be adapted to suit today's changing times.

A close-up photograph of a metal chain link, showing the texture of the metal and the circular shape of the link. A white rectangular box is overlaid on the lower right portion of the image, containing a quote.

“

*Our philosophy: the best financial advice is the kind that continues long after your investments, insurance or superannuation is established.*

”



“ Successful people share one common feature - they have at some stage in their life, received good advice. ”

# COMMITMENT TO SERVICE

Prosperity Partners values long-term relationships with our clients. By working in partnership with you, we can progressively accumulate and maintain your financial wealth with tailor-made programs.

The following highlights Prosperity Partners 'Six Step Service Strategy' to ensure a high level of customer care.

## **Step 1** **Discovery discussion**

Meet for an initial consultation to gain a better understanding of your needs and provide you with the opportunity to learn more about us.

## **Step 2** **Listen to your needs**

We collect information using a confidential questionnaire to determine your personal objectives, your attitude toward risk and security and your interest in different types of investments.

## **Step 3** **Individual solutions development**

Your adviser will develop an appropriate individual financial plan recommending thoroughly researched investments and strategies which meet your needs in a tax effective manner.

## **Step 4** **Strategy presentation and refinement**

The strategies contained in the plan will be personally presented to you and discussed in full, to ensure you are comfortable with the approach we have recommended. This ensures we precisely match your needs to the selected strategies and investments prior to implementation.

## **Step 5** **Strategy implementation**

The agreed strategies will be implemented and a member of our team will assist you with the completion of relevant paperwork. Recommended investments, insurance or superannuation documents will be completed on your behalf.

## **Step 6** **Measurement and review**

Once your plan is in place, a review program will commence with mutual agreement.

This step is a critical element in turning your financial goals and dreams into reality.

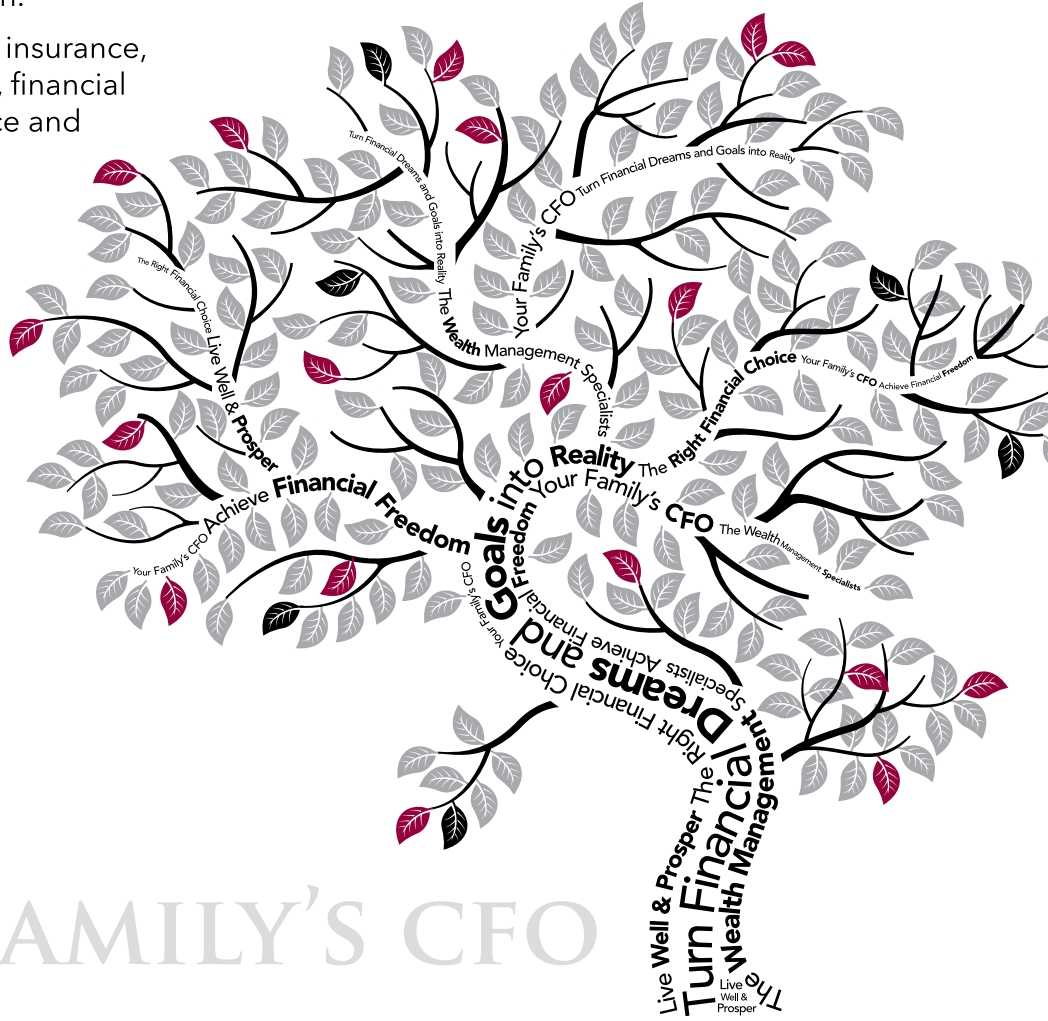
# CORPORATE FINANCIAL SOLUTIONS

Prosperity Partners provide clear, comprehensive solution based approaches to finance, insurance and investment solutions with a particular focus on innovative growth based strategies.

Our suite of financial services supports the growth of your business, assisting to eliminate financial worry and concern.

We assist with commercial insurance, corporate superannuation, financial planning, general insurance and tax planning.

Prosperity Partners provides financial solutions and advice to small, medium and large businesses across a variety of industries. Our tailor made programs are design to meet individual business and employee needs. Our service is carried out with your involvement to ensure delivery is convenient, consistent and exceeds your expectations.



# YOUR FAMILY'S CFO

# PERSONAL FINANCIAL SOLUTIONS

Successful people share one common feature - they have at some stage in their life, received some good advice.

When we are young, we tend not to seek advice. As we grow older, we understand in an increasingly specialised world, there are a number of experts we can call on to help us. However, with the demands of a family and career, we often don't find the time to seek out this advice.

Ironically the older we get the more we tend to resist change and often become less certain about the complex world of financial markets, changing government regulations, tax laws and accounting legislation.

To enjoy the fruits of our labours, we all need advice on financial, superannuation and insurance matters. One of the best investments you can make is to seek advice from a well trained, competent and helpful financial professional.

At Prosperity Partners we provide advice suited to your individual situation. You may be starting out in your career and want to put a savings plan in place to achieve your long term goals.

Or maybe you are at a later stage in life and need advice on correctly structuring your finances to take into consideration issues such as paying off your mortgage, protecting your

home, car and personal income, ensuring your children's education is catered for and putting a little aside for a well earned annual holiday.

Studies show that people spend almost a third of their life in retirement.\* Once we reach retirement we want to be able to enjoy all those things we have been dreaming of without constantly having to worry about where the money is coming from.

Whichever stage of life we find ourselves in, by receiving professional advice from a fully trained financial adviser our clients can relax and enjoy life.

\*Source: "Time for Retirement" Cambridge University Press (1991)





# PROSPERITY PARTNERS

Prosperity, prestige, platinum (VIP treatment), strength.  
The circle represents unity, partnership, collaboration  
between client and company.

The brand reflects the business philosophy of Prosperity  
Partners, providing a high level of reputed client care  
based on premium financial solutions.

Suite 2, 136 Stirling Hwy Nedlands WA 6009

**P** (08) 9442 0666 **F** (08) 9442 0611

[prosperitypartners.com.au](http://prosperitypartners.com.au)

T H E   W E A L T H   M A N A G E M E N T   S P E C I A L I S T S