

# WHO IS ADVICE FIRST AND WHY SHOULD YOU DO BUSINESS WITH US?

## Who is Advice First?

We are a business that provides education and advice to individuals in the areas of personal finance. We have a 25 year history of helping clients build wealth through property & shares, protect their loved ones with life insurance, find the most competitive home loans and most importantly, make sure their retirement is well planned.

## Why should you do business with us?

We offer a personalised advice and education service, not a one size fits all solution. We have a team of specialists to handle all aspects of your personal finances, followed by regular progress meetings to make sure you remain on track. If we don't hear from you, you'll hear from us.

## How can we help you?

**Holistic advice** This comprehensive service analyses all aspects of your personal and financial position, followed by the development and implementation of clear strategy to achieve your goals.

**Scoped advice** If you choose, you can limit our service to one particular area. Quite often, our clients only require advice relating to their home loan, investment property, superannuation, life insurance or income protection.

## What process would you go through?

- Step 1 - Initial consultation to gain an understanding of who you are and what you want to achieve (FREE)
- Step 2 - We'll present our quote to you. This will outline the areas we think you need assistance and related costs to implement the proposal.
- Step 3 - We'll document our recommendations in a Statement of Advice, including any advantages and disadvantages.
- Step 4 - We'll implement any recommendations and handle all paperwork on your behalf.

## Who is Trent Rose?



After graduating from Griffith University, Trent joined the industry in 2005 and has been with Advice First for the past 5 years. He is an excellent source of knowledge to help you make informed decisions and has a way of taking complex problems and explaining them in simple terms. Trent's a keen surfer so when he's not at work, you may spot him out in the surf.

**“A testimonial from one of Trents clients to go here. A testimonial from one of Trents clients to go here. A testimonial from one of Trents clients to go here.”**

So when thinking about...

Home loans or refinancing, Investing in shares or property, Life insurance & income protection, Superannuation, Retirement planning, Cashflow & budgeting, Your overall, financial strategy

...Seek Advice First

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