



EVALESCO

Financial Services



It's all about you

Everything we do is focussed on you, so why should our brochure be any different?

Getting to know you

Please don't think we are being nosy when we ask you a lot of questions. We need to know as much about you as possible, so that we can provide you with the very best strategy for your circumstances. We don't do 'off the rack' or 'one size fits all'. We only provide customised solutions.

We work with a wide variety of clients. We help:

- young professionals who are just starting out in the workforce and hoping to build some good habits, or save toward a deposit on their first home
- people who have bought their first home and created some equity but are confused about what to do next
- those who plan to retire in 10 to 15 years and are looking to get their finances in order to maximise their retirement savings and subsequent income
- retirees who want to make sure they're doing everything they can to maximise their retirement income and the longevity of their capital
- those who have built a nest egg and are looking for advice on asset allocation, diversifying investments, specialist investment selection, and risk management
- small business owners who want to protect what they have built now, and build a succession plan for later.

The only thing they have in common is that they either have a nest egg of anywhere between \$500,000 and \$5 million, or that's what they want and they're willing to take action to get it. Does this ring any bells for you?



Before we get started, we'll ask:

- where you're at in life – your current financial position including assets and liabilities, income and expenses
- what's important to you – is it a legacy left for family, ethical investment strategies, asset protection, current income or future growth?
- where you want to get to
- when you want to get there.



Your personal strategy

We use everything we know about you to prepare your financial plan that will achieve your goals, within your timeframe, comfort level and budget. You might also hear your financial plan referred to as a Statement of Advice (SoA). Your financial plan will explain in detail the solutions we recommend for you. Depending on your needs, your financial plan might include one, some or possibly all of our services.

Let us explain our services diagram to you a layer at a time.



With everything we do, you are the centrepiece of all activity. No matter what, we make sure that the overall strategy is always focussed on you.



The middle layer shows you the comprehensive range of advice and services we offer.



The outer layer shows the specialists ordinarily required to implement specific services. At Evaluesco, we are able to fulfill many of these roles ourselves. We also have a trusted network of professionals we can call on where we believe it will benefit you.

It's your choice

You are in control. Just because we can do everything shown in the services diagram, doesn't mean we have to. You set your priorities, and we'll work towards achieving them. You set your timeframe, and we'll work within it. Of course, we can help you identify your priorities and timeframe, but you always have the final say.

...and a little about us

We thought you might want to know a little bit about us before you come to meet us. Even when it's about us, it's all about you!



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Who are we?

Evalesco Financial Services is a boutique financial planning company, privately owned by Directors, Jeff Thurecht and Marshall Brentnall. You'll get to know us very well as we are also hands-on senior financial planners. We have a young, experienced, and enthusiastic team motivated by helping good people achieve their financial goals.

We live up to our name

Yes, Evalesco is an unusual name, but as with everything we do there is a good reason behind it. Evalesco is Latin and means to grow strong, to prevail and have value. This represents the goals we have for both our clients and our company. Don't worry, use it a few times and it will just roll off your tongue.

We are experienced

Evalesco Financial Services was incorporated in 2001, and has been growing stronger ever since. Prior to Evalesco, both Jeff and Marshall earned their stripes in several financial planning roles.

We are qualified

Jeff and Marshall are both Certified Financial Planners, which is the highest certification available in financial planning. We are members of the Financial Planning Association, which means we are bound by a code of ethics

and high professional standards over and above that required by law.

To keep up to date with our ever-changing industry, we are committed to a program of ongoing professional education.

We play our own game

Evalesco is a corporate authorised representative of Professional Investment Services (PIS).

Neither Evalesco nor PIS are owned by or aligned with any major financial institutions or product providers.

This allows us the freedom to recommend the solution and/or provider that best meets your needs.

We are people people

We like people.

We like numbers too, but mainly because we know that what we can do with numbers (especially those with dollar signs) makes the people we like happy.

We want to be your partner

Who has the time these days to do everything they have to do, let alone the things they *want* to do? The key is outsourcing.

Let us help you with your finances so you can have more time (and money) to spend with your family and friends.

Call us on 9252 6800 to set up an appointment.



Evalesco Financial Services Pty Ltd, ABN 75 162 632 950, is a corporate authorised representative of

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