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Value Vindicated

"Most people spend more time on Facebook than on focusing on investing in their financial security," says Marshall Brentnall, who with Jeff Thurecht runs Evaluesco Financial Services in Sydney's CBD and was recently awarded Financial Planner of the Year.

And he's right. Even though work occupies our days and weeks and years, we avoid discussing the product of our labour (money), our financial futures, even the security of our families, often until it's too late. "It's beyond most people's comfort zones," explains Marshall. "So they ignore it, don't ask for help or feel like there's some stigma attached. But it can be complex. You generally don't know what you don't know. We want people to let us, the experts, demystify the options available and fill that void." This proactive, client-centred approach won Marshall the Financial Planner of the Year Award, announced in Las Vegas at the Professional Investment Services 2011 conference. "This award really meant a lot to me, since it was nominated by my peers and staff in the PIS group and recognizes the quality of our advice and our business ethos." But in his characteristically modest manner, Marshall shares the credit. "The award might have my name on it, but it is actually a team award, the simple reason being that without Jeff and the rest of our staff (Belinda, Warren and Kristi), it would not have been possible." Marshall and Jeff had been colleagues and firm friends for over 10 years, before becoming business partners in Evaluesco in 2007.

"Whilst working in separate Financial Planning businesses, we realised that in order to build a truly exceptional advice business, you need to surround yourself with quality people. In 2008, the time was right to join forces." Jeff was ecstatic with Marshall's win, taking pride in the award as "vindication of the decision to work together and build a strong team". "I am very proud of Marshall's achievement in winning the award, both as a mate and his business partner. I know that his commitment in putting our clients first and always striving to achieve the best outcome for them is one of the key factors in the growth of our business, even through the difficult GFC period. "We explain to our clients that it's very difficult to do everything on your own. The support of a good team and trusted advisers can certainly make the journey more enjoyable and ultimately more rewarding. That's certainly how the team at Evaluesco sees things! "Evaluesco" is Latin for "to grow strong, prevail, or to have value", fitting for a company that sees its role as a mentor, motivator, coach. "All successful businesses and sportspeople have coaches and advisers, without exception. Even the best performers maintain the services of a coach because it's the coach's role to keep them



Marshall Brentnall

Partners: Marshall Brentnall and Jeff Thurecht.



L to R: Marshall Brentnall, Belinda Marley-Wallace, Kristi Teasel, Jeff Thurecht, Barbara Richardson and Warren Desmond.

“The best performers maintain the services of a coach to keep them accountable and to get the results they want to achieve.”

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In a comparable way, Marshall and Jeff “aim to assist our clients to articulate their objectives and then put in place the required strategies to ensure that they achieve their objectives”.

“Throughout this process we also seek to better understand the specific barriers to financial success that many of our clients need to overcome. Some of these include procrastination, looking for the ‘magic solution’, distraction, never taking action and not asking for help.” These “barriers to financial success” are symptoms of the life stage of the demographic of many of Evaluesco’s clients. “They are generally busy professionals, 35-45 years, working, paying off their homes, looking to make those extra steps now. We term them ‘Pathway clients’, an often overlooked part of the market. This niche has considerable aspirations for wealth creation, and it’s our commitment to partner them as they move along the pathway of life.”

This market segment, perhaps more than most, is time poor, have multiple distractions in their lives and recognise they do not have the time to manage their financial affairs.

“The Evaluesco Pathway to Wealth program addresses all aspects of our clients financial lives, including both growth investments (shares and

property),” explains Marshall. “Our program provides our clients with direction, certainty and more time with the ones they love, their family and friends.”

The Pathway to Wealth seminar series and program, which the company has been using for the past 12 months, was instigated by Rob McGregor of Holman McGregor. “We feel that we have implemented this program into our business particularly well, which has allowed us to develop greater efficiencies and create additional value for our clients.”

Not only did the company receive the PIS Financial Planner of the Year Award in 2011, it was also nominated in the City of Sydney Business Awards (2011). Evaluesco, says Marshall, provides “holistic advice across superannuation, insurance, investment cash flow and home loan planning”. It is fee for service for investment and superannuation advice, and receives commission on home loans and insurance.

The company has around 200 clients, most of whom have been with them four years or more, and they rely on referrals from clients and accountants for new business. Over and above their impeccable credentials and runs on the board, the real appeal of the team at Evaluesco lies in their down to earth, nothing slick, genuine values.

The feedback from clients and peers in

the industry are testament to Marshall’s client-centric vision. One client of several years praised Marshall and the team at Evaluesco for making the process easy.

“They were refreshingly honest and have really helped with cashflow planning for my wedding. Marshall assists me greatly by spelling out the financial jargon in layman’s terms which helps me know where I am going with my investments, insurances, super and loans.”

Yet another is relieved at the professional “light” Marshall has shed on complicated financial issues, saying “Marshall has guided me through, what can be, a dark financial maze. He has always been very candid and open in his advice which has enabled me to make some giant strides towards achieving my financial goals.”

The clients and their security keep Marshall motivated. “This business can’t be about computer screens, tables and numbers. The strategies can be complex and that’s where we come in, but the attitude to clients has to be real and warm. We are helping people achieve their dreams, their goals and providing security for their loved ones. A technical approach with complicated terminology won’t bring out the best in people. Like a coach, we have to inspire, challenge and support.” **iy1**

Evaluesco 5 ‘must-do’ tips for people wanting to achieve financial success:

1. Own your own home (& pay off your mortgage asap).
2. Invest in both growth assets (property & shares - long term).
3. Consolidate your super (& make sure it’s working for you!).
4. Make sure you have income protection insurance.
5. Get a Financial Coach and take action (preferably one of the team at Evaluesco).

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