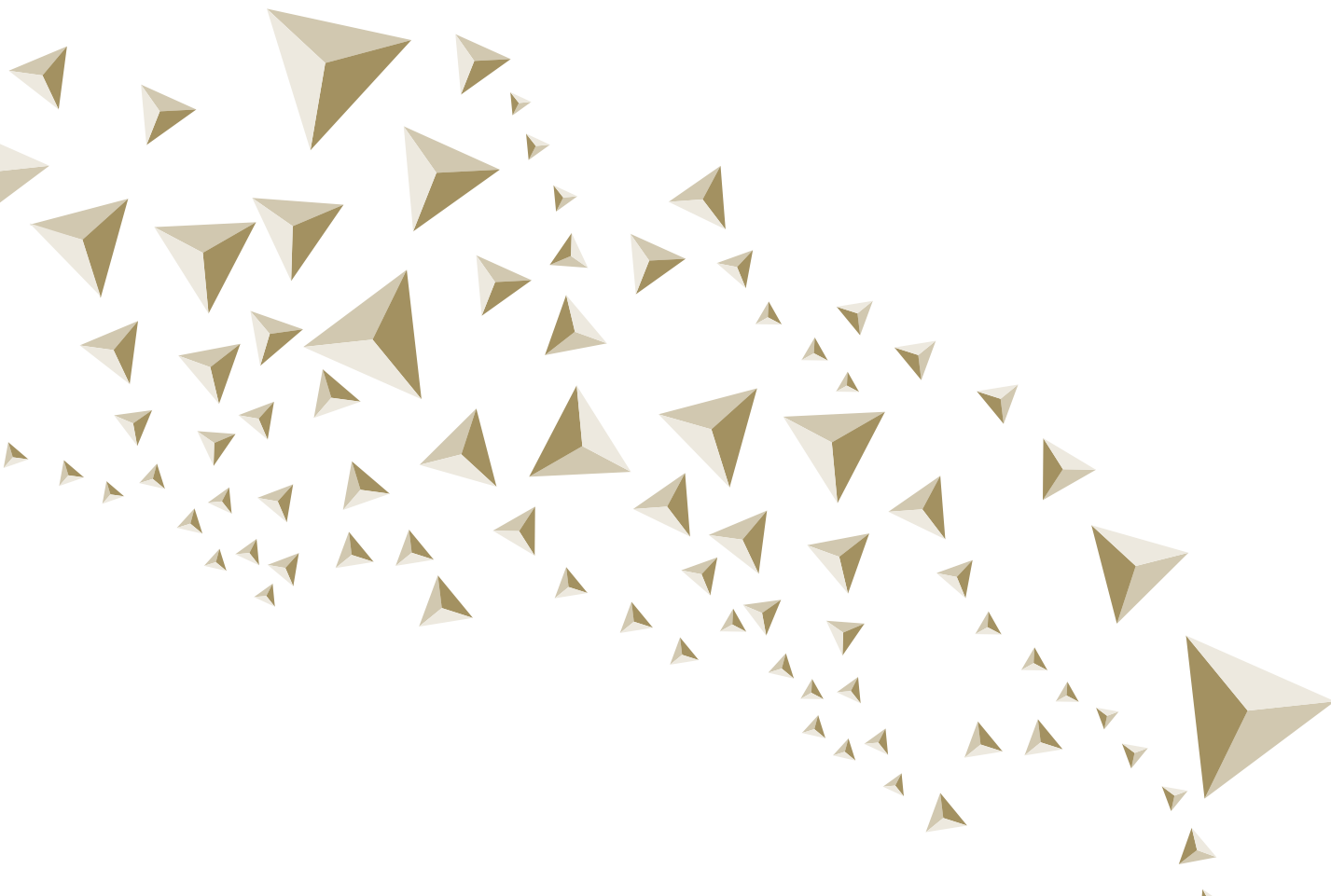





Insight
Financial Services Pty Ltd

Success by Design





Your financial future begins with the goals and strategies you put in place. Changing legislation, technology and the fast pace at which we all live makes setting and achieving goals challenging - if not impossible - without professional advice.

At Insight, we provide you with the people, the plans and the processes you need to achieve financial success.

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Welcome to Insight

Many people associate financial planning with retirement – but it is much more than that. Financial planning is about planning for and managing the financial impact of events that occur at every stage of life.

At Insight, we give you the focus you need to achieve your financial goals – no matter what stage of life you are at.

Financial planning is a journey and your personal financial plan is just the beginning. At Insight, we're there to see you through every step of the way. We keep you on-track to achieving your goals in the face of the inevitable changes you will experience in your personal circumstances and the equally inevitable changes that will occur in our economy.

At Insight:

- ▶ We believe in close, long-term relationships
- ▶ We are committed to client communication
- ▶ We care about the services we provide to our clients

We provide expert personal financial advice that covers:

Wealth Acquisition
& Management

Wealth
Preservation

Wealth
Enhancement

Wealth
Protection

Wealth
Succession

Your Needs

We all encounter events that change our lives and our financial priorities. Being well-informed and accessing the right advice is critical to successfully managing these events.



We give you the insight to help you make the right decisions about your future

Our services can assist with some of the decisions you make related to:

- ▶ Asset acquisition and growth
- ▶ Becoming a business owner or partner
- ▶ Debt reduction
- ▶ Lifestyle changes
- ▶ Planning for retirement

While there are some things in life we can plan for, there are many others that are completely unpredictable. A financial plan can help you to manage unpredictable events.

Once in place, your plan must be regularly reviewed to ensure it remains relevant and up-to-date.

Our Service

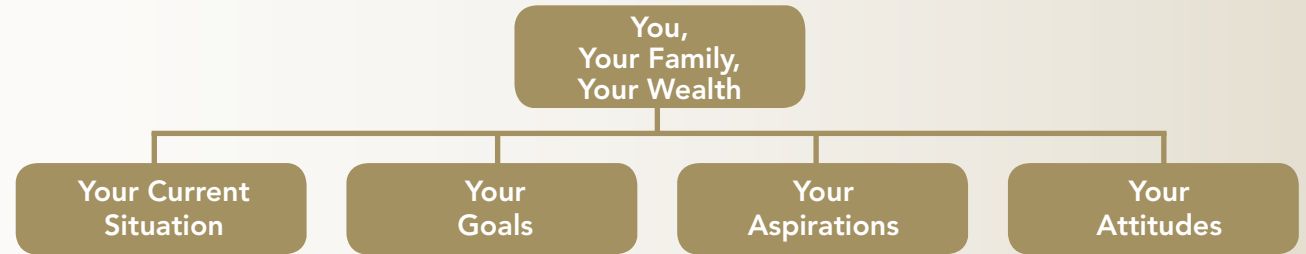
Listening - it's the first thing we do.

We start by listening to you. This helps us to understand your current situation and your goals. We'll also ask questions and explore different scenarios with you - it's how we gain insight into your situation.

The more insight we have, the more thorough our financial advice will be.

Our approach is underpinned by three core components:

- ▶ **Trust:** the trust our clients place in us is critical to a strong, long-term working relationship
- ▶ **Strategy:** this is our core strength and where we add significant value
- ▶ **Performance:** our ability to perform to your expectations is critical to your future success – and ours



Why Insight?

Who are we?

Insight Financial Services is a privately owned boutique financial planning business which provides expert strategies and solutions that satisfy our clients' needs. With over 60 years' collective experience in financial planning, we have a proven track record in helping people to achieve their goals.

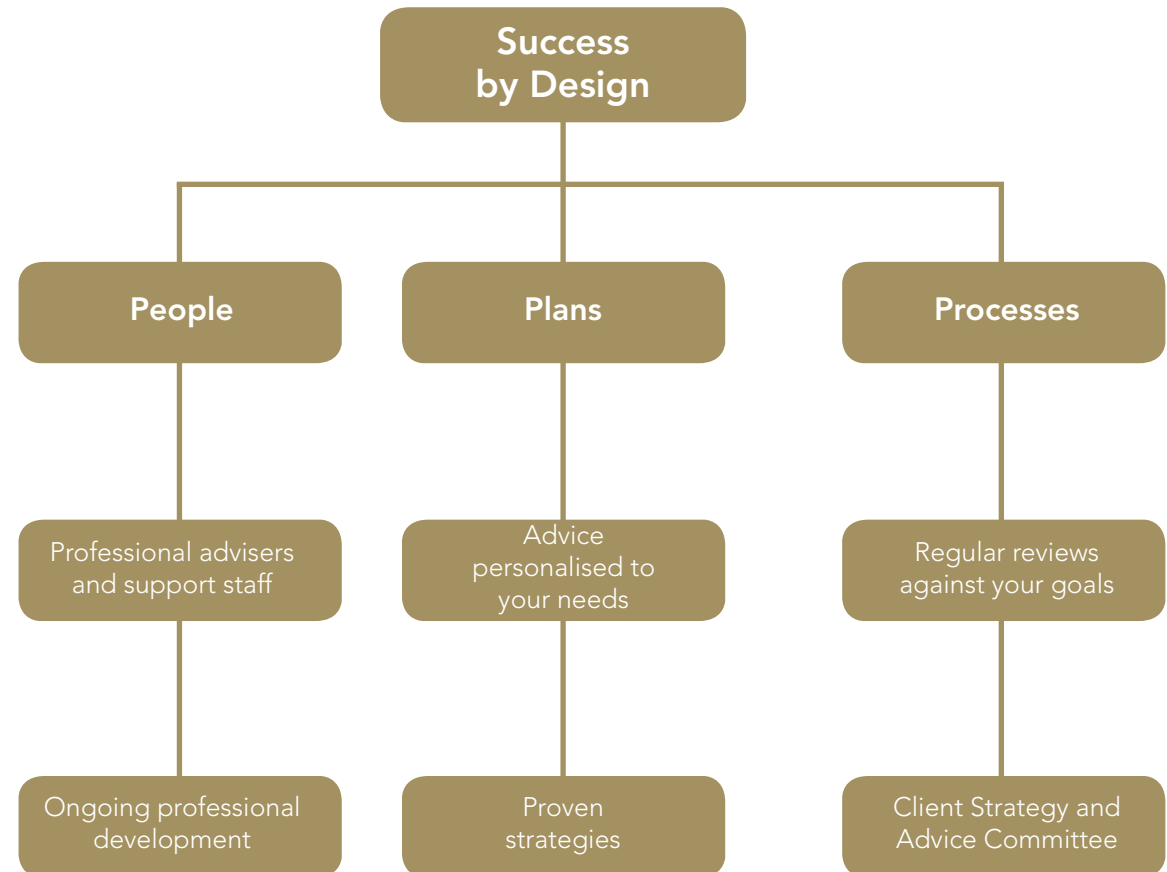
Specialist advisers

When advisers join Insight, they commit to professional standards and ongoing personal development to keep their technical skills where they need to be in order to deliver outstanding advice and service.

Professional staff

We have selected our support staff based on their abilities and expertise. These qualified, experienced and dedicated people work with our advisers and practice manager to provide you with a whole team of people working together towards achieving your goals.

Please find enclosed a copy of our Financial Services Guide and Adviser Profiles which together provide details about our licensee, the services we can offer, how we operate, how we are remunerated, how we deal with any complaints and also discloses any interests or associations that could potentially influence our advice.





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