

A Lifetime of Financial Care



FOUNDATION
WEALTH
ADVISERS

www.fwagroup.com.au

Follow us on



A Lifetime of Financial Care

We, the team at Foundation Wealth Advisers pride ourselves in providing a personalised and professional service to you, our clients. Whether you are just starting your working life, going through one of life's many challenges, getting married, having children, purchasing a home, going through a redundancy or retiring, we are here to help you understand and make the most of your situation.

We care; we genuinely understand the magnitude of financial decisions; and we will take the time to work through your concerns *with you*. We take an interest in you and your family, and we are there for you whenever you need our help.

- ✓ We will take the time to listen, know and understand *your* needs.
- ✓ You can have confidence and trust that your problems will be solved in a way *you* understand
- ✓ We will give you a roadmap for your financial future, offering solutions and giving clarity and direction.
- ✓ We are thorough in everything we do, alleviating your stress and concern.
- ✓ You will never feel like a number. Our relationship is with *you*, not a file.
- ✓ We build our business on ongoing relationships. We will help you to feel relaxed and confident at all stages of our dealings.



Our services to you

We help you make smart decisions about your money. We achieve this through a tested and successful process – the creation of your own wealth plan.

The key to an effective **wealth plan** is to analyse and integrate all aspects of your financial situation to ensure they are synchronised and working efficiently towards achieving your goals.

Our comprehensive wealth planning process would commonly include:

Making it

Your income plan would provide strategies to improve your cash flow through a combination of tax effective measures and the efficient use of your income. The resulting surplus funds are then used to create wealth.

Leveraging it

Your debt plan would analyse your current debt structure and would determine the role debt can play for you in building your wealth.

Growing it

Your investment plan would explore the different options available to you and applies the income plan and debt plan analyses to help you achieve or exceed your goals.

Protecting it

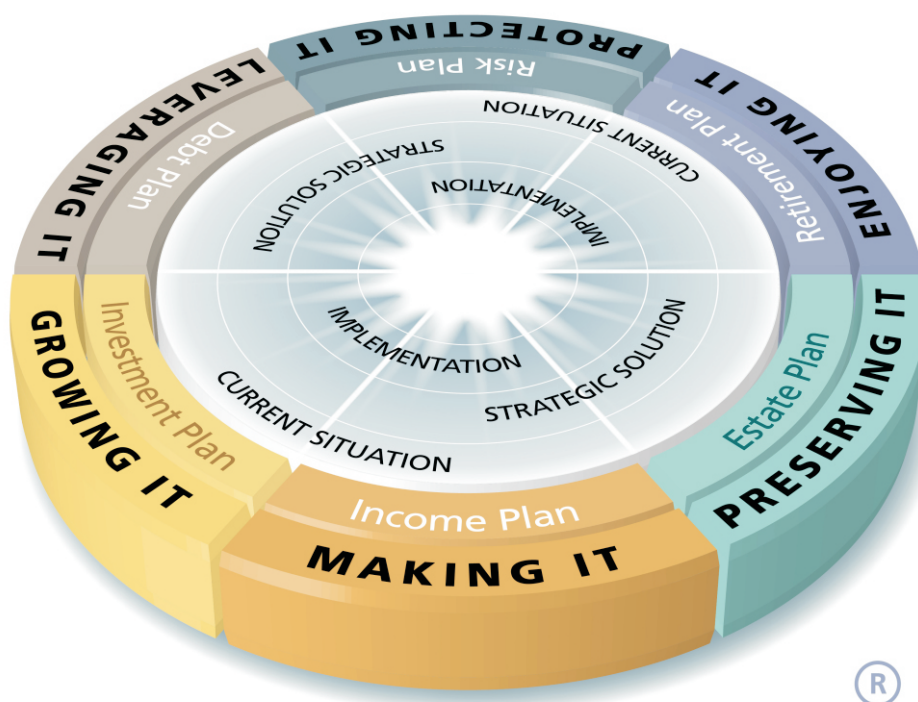
Your risk plan would analyse your financial needs in the event of a setback to your most important asset, your health. It would seek to identify and where possible mitigate your exposure to financial stress in the event of an inability to earn income. Getting the right level and type of insurance in place is critical to reducing your financial risk.

Enjoying it

Your retirement plan would identify your income needs in retirement and the level of assets required to provide this income. We would work with you to achieve and sustain the lifestyle you desire.

Preserving it

Developed in conjunction with your solicitor, who will draft any required documentation, your estate plan would help articulate your wishes in the event of your death and determine a strategy to provide your family with funds in a tax effective manner and with asset protection as a priority.



A Lifetime of Financial Care

Our Advisers

Stuart and Mark have combined experience of over 50 years in the industry. They can provide a range of wealth advice and assistance to help you grow, manage and protect your wealth. They can help you create the financial security that lets you focus on what's really important to you.



Stuart Bale B. Com Dip FP



Principal and Private Client Adviser



Mark Hudson B. Com CA

Principal and Private Client Adviser

Administration Team

Stuart and Mark are supported by an experienced Administration Team who are dedicated to assisting you, ensuring your information is treated with confidentiality, integrity and efficiency.

Our administrative support team are an integral and highly valued component of the advice and ongoing services provided by FWA.

'We aim to make our clients' experience a comfortable one.'

Client Experiences

The success of our business is largely due to referrals from our existing clients. A referral from friends and clients pleased with the service we provide is the finest compliment we can receive.

"Foundation Wealth Advisers offer a complete Financial Advisory Service committed to giving us the very best of investment information for our portfolio. For many years we have been impressed with the professionalism and the comprehensive assistance that the experienced team at Foundation Wealth Advisers have delivered."

"We have had various dealings with Stuart and the FWA Staff since our retirement and have always had prompt professional service with a smile. We would not hesitate to recommend FWA to anyone seeking to avail themselves of quality professional advice."

"Over many years we have put our financial trust in the team at Foundation Wealth Advisers. Mark and the FWA staff have provided us with friendly service and expert advice. We highly recommend Foundation Wealth Advisers to those seeking financial management and advice from a professional team."

"We are retirees who over the last 10 years have always found Stuart and the FWA staff to act in a professional and timely manner and would be happy to recommend them to our family and friends."



FOUNDATION
WEALTH
ADVISERS

1/9 Scott Street Bellerive TAS 7018

Tel (03) 6244 8822 Fax (03) 6244 8810
www.fwagroup.com.au

Foundation Wealth Advisers Pty Ltd ABN 49 134 62 0349
is an Authorised Representative and Credit Representative of Charter Financial Planning Limited, Australian Financial Services Licensee and Australian Credit Licensee

Certified Quality
Advice Practice