

Benefits of working with Tudor Investassure.

▶ **Easy Contact.**

- At Tudor Investassure we make it easy for you to get in touch with us, make appointments and stay in contact.
- We offer meetings at our office or at your home or office.
- We are available for daytime or evening appointments.
- Our child-friendly facilities give you peace of mind knowing that you can bring your children to meetings and still focus on your financial needs.
- We offer flexibility in doing business and communicating with you whether it is face to face, over the phone, or by email, web, fax or post. It's your choice.

▶ **Keeping you informed.**

- Making adjustments to your financial strategies can take time. At Tudor Investassure we keep you informed of the progress from our very first meeting and we set clear expectations along the way. This means you can be reassured, be organised and be in command of your financial future.
- We meet with you to present recommendations and ensure you understand the advice. We're not happy until you're comfortable with our advice.
- We provide regular reporting and have a range of ongoing service packages depending on your needs and requirements.

▶ **Making it Simple.**

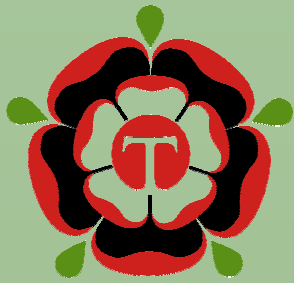
In the ever increasing complexities of this world, our aim is to make it simple for you to do business with us by:

- **Empathy with your needs.** Through our comprehensive fact finding process, we gain an in depth knowledge of who you are, how you are positioned today and what you want to achieve financially. We then put together well reasoned, practical strategies that simply and effectively assist you to achieve your goals.
- **Clear, concise and exclusive plans.** Our bespoke Statements of Advice are easy to read and clearly explain our recommendations and how to proceed with implementing any changes. We provide a structured meeting to go through the recommendations with you to make sure you understand our advice before you proceed.
- **Effortless implementation.** We are expert at filling in forms and following up with product providers and offer you an implementation service that delivers results efficiently, effectively and with minimal effort on your part. We save you time.
- **Educating you along the way** with regard to financial concepts and strategies, helping you make informed decisions and stay in control of your future. We translate complex financial information into easily understood, familiar concepts to help you visualise how you will achieve your goals.
- **Trusted advice.** We pride ourselves on being open, honest and accurate in our relationship with you so that you can rest assured the information you receive is of the highest quality. This means you can be confident your future is secured.

TUDOR INVESTASSURE
PTY LTD

is a corporate authorised
representative of
Millennium3 Financial
Services Pty Ltd
ABN 61 094 529 987
Australian Financial
Services Licence No.
244252

Unit 7, 50 Borthwick
Ave, Murrarie Q 4172



▶ **Professional advice and service.**

With over 50 years combined experience in the financial planning industry, we have seen it all. Our knowledge and experience helps you with:

- Leadership to guide you through the complexities of financial planning. We use our knowledge and expertise to develop the strategies and solutions that best meet your needs.
- Support and perspective to keep you on course and avoid making inappropriate decisions when the ride gets a little bumpy.
- Focus you on your long term plans. We constantly monitor your portfolio to ensure you remain on track to achieving your goals.
- Rational and unbiased perspectives to help you formulate realistic, practical and achievable goals.
- Ongoing discovery of issues or opportunities as your goals, attitudes or relationships change to make certain your plans are still relevant to your circumstances.

▶ **Boutique service, comprehensive capability.**

As a Corporate Authorised Representative of an Australian Financial Services Licensee that is institutionally owned yet independently run, we have access to a vast network of resources. We can offer you:

- **Superior life insurance product research.** With access to the full market of life risk insurance products we keep informed and up to date via a research system that provides qualitative and quantitative analysis of personal risk insurance products. This assists us to consider a range of solutions, select the most appropriate products for your needs and package them cost effectively.
- **Underwriting pre-assessment.** After applying our expert field underwriting skills and comprehensive medical knowledge to your specific state of health, where required, we use our pre-assessment service to determine whether or not you can obtain personal insurance and under what conditions. This unique service saves you time and money.
- **Excellence in investment research.** Through Morningstar, a leading provider of independent investment research, we have advanced research capabilities to monitor and manage your investment portfolio.
- **Quality education.** Knowledge is core to our ability to provide you with practical solutions for your financial needs and we continuously and consistently enhance our understanding of financial and business matters with a range of professional development activities throughout the year. In turn, we pass on our knowledge to you, helping you to make better and more informed decisions.
- **Optimised advice.** With access to simple, effective technological tools, we can provide you with outcomes that give consideration to a range of scenarios during all phases of your life, helping you to achieve your goals.

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