Capital Results...

Helping clients achieve
financial independence.

Capital Results

At Capital Results, we understand that one size doesn't always fit all.

Welcome to Capital Results

Our focus is on your success

At Capital Results, we believe developing a financial plan with a professional adviser is one of the most powerful steps you can make in life.

Our core purpose is this: to deliver tailored solutions that will achieve your financial goals. Everything we do is about that commitment – from understanding your financial needs – to the development of a close partnership and a plan to successfully meet them.

At Capital Results, we offer a boutique service backed by our reputation for quality professional advice. We don't sell products and services you don't need, but rather, create a plan that's right for you. As your goals and circumstances change, we respond by adapting our advice accordingly.

Our qualified advisers are trained to offer professional advice for every stage of your life:

- **Wealth creation** – planning to be independently wealthy
- **Superannuation** – developing the right structure for your needs
- **Retirement planning** – ensuring a comfortable life when you cease work
- **Risk management** – the importance of protecting your wealth
- **Estate planning** – ensuring your assets are protected and maintained

Our advisers draw on the latest and most effective financial products and services available. They then tailor these to suit your particular circumstances. If complex situations arise, Capital Results offers the support and expertise needed to guide the way. Our specialised, boutique structure ensures you always experience a personal service. In particular, when you call Capital Results, you have the assurance of contact with an adviser, not a call centre.

What we do...

At Capital Results, we believe the real value of advice comes from the commitment our staff provides to each of our clients. This includes:

- **Strategic Direction:**
  We make every effort to understand (and sometimes help you understand) your financial goals and set a strategy to reach them. We help guide clients through the complexities of financial planning.

- **Focus:**
  Life doesn't always offer us smooth journeys and often when we hit a bumpy road, we are unprepared. At Capital Results, we provide clients with perspective, confidence and sometimes emotional support to help stay on course and avoid making inappropriate decisions when they are under pressure.

- **Expertise:**
  The sophistication behind a financial plan is often underestimated. The science of managing money is made more complex by the constantly shifting landscape. We have the skill, knowledge and expertise to help clients reach their financial goals.

- **Time saving:**
  We understand your time is precious. We take care of reviewing your investments, lodging applications, undertaking research, compliance and handling all administration tasks on your behalf.

- **Ongoing discovery and course correction:**
  Goals change, attitudes change, relationships change. Not only must a plan be monitored, but the goals and relevancy should continually be tested. We help ensure that your plan is still relevant for your future circumstances.

A Capital Results Financial Adviser can help you make it happen!

Actively reviewing your financial plan with a Capital Results financial adviser can help create a clear picture of where you want to head. We can help you achieve better control over your finances, an increased sense of security and greater confidence about the future.

Our partnerships are built on a lifetime of advice.

Listening to you…

The advice process

At Capital Results, we understand that each client has many options to consider when it comes to creating and managing their wealth. So to help you navigate through the complex options, we offer our clients a disciplined and objective partner who delivers advice based on an intimate understanding of their needs and objectives.

Our advice process is based on the following:

- **Initial Fact Find**
  Our investment process starts with understanding you - your background, investment objectives, risk tolerance and existing investment pattern. A comprehensive Client Profiling exercise helps us in evaluating your risk appetite and understanding your investment objectives, which are kept in mind while building your financial plan.
- **Strategic advice**
  We employ advanced wealth management solutions which reflect your individual objectives. The Strategic Plan will discuss a diversification strategy and identify appropriate investments, as well as look at any social security issues, risk management, and taxation planning. It will also explain in detail the benefits, features, and fees. The result is a holistic financial solution – a financial 'map' documented in our detailed written report to you known as our Statement of Advice.
- **Proactive Review**
  We monitor and measure progress towards your goals, and ensure that our advice is robust. Our ongoing proactive review process is designed to keep us up to date with your needs including:
  - Understanding changes to your personal and financial circumstances affecting your long-term plan.
  - Providing written updates about the economic environment, and any investment and legislative changes that may impact on your strategy.
  - Offering additional advice about your investment portfolio and its valuations.
  - Recommending changes to your investment strategy and/or investment portfolio.

Delivering value...

Your initial fact finding consultation with us is at our expense – there is no cost and no obligation. During this session we will discuss your financial objectives and what type of advice you'll need. You will also receive a quote on what the advice would cost you, should you decide you want a financial plan.

At Capital Results we charge a fixed fee-for-service, where all the fees you pay are agreed to in advance before any personal advice is given. This means you know up-front how much our advice will cost and you can be sure that there are no hidden fees.

We also have a number of ongoing service packages designed to suit your needs. They vary in cost and features depending on the demands and complexity of your situation.

These services may include:

- Face to face meetings with your Adviser
- Formal review of your portfolio and financial plans, including valuation and asset allocation reporting, providing strategies and recommendations in relation to changes to your investments where appropriate
- Regular access to your Adviser
- Regular direct contact in relation to any changes in legislation or investments markets that may affect you
- Assistance with summaries of transactions for tax purposes
- Newsletter, market commentaries and economic updates
- Invitation to our annual "Meet the Managers" function

Financial independence is generally achieved when income from your investments is greater than your living expenses.

Your conversation begins here… Partner with a Capital Results financial adviser today.

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Lifetime advice

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