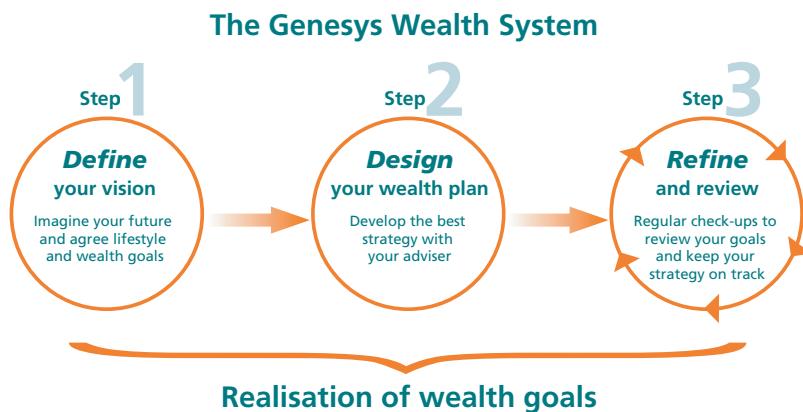


The Genesys wealth system



We see creating and looking after your wealth as a lifelong commitment. That's why we offer regular financial advice and guidance throughout the different stages in your life. Together, we can build the financial wealth that lets you enjoy the truly important things in your life.



The three-step Genesys Wealth System

Whether you're starting to build your wealth, or hoping to manage and protect it, we've developed a process to help you establish your wealth and lifestyle goals, design a strategy and keep you on track to achieving them.

Define your vision

Your initial consultation with a Genesys wealth adviser will be a chance to get to know each other. Together we'll establish your current financial situation, and then

imagine the future you want. From there we can define your wealth and lifestyle goals.

Design your wealth plan

We create a personalised wealth plan across all aspects of your financial health including debt management, wealth creation, risk protection, retirement planning and estate planning. Your Genesys wealth adviser can help you navigate effectively the complex legislation that governs investment, tax, superannuation and social security. Innovative technical strategies designed

for your own circumstances, combined with thorough investment research and selection, form the basis of your plan.

Once you've understood your strategy and we've recommended the best way to achieve it, it's time to implement it. This may involve helping create or manage an investment portfolio, risk protection strategies, business advice or recommending appropriate company or trust structures.

No matter what stage of your life you are in – building wealth or securing a retirement income – your plan will include strategies to help you reach the best financial position possible.

Refine and review

You should meet with your Genesys wealth adviser at least once per year to review your strategy in line with changes in your life. These check-ups mean your plan always matches your situation. By working in partnership with your Genesys wealth adviser, you stay on course to achieve your wealth and lifestyle goals.

For more information about the Genesys Wealth System or to arrange a no-cost, no-obligation first consultation, please contact:

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