

Are we Compatible?



Before we get involved in a relationship, please let us make sure we are compatible

When you, as a new client, come to see one of our advisers at Genesys Wealth Advisers Limited, what you are seeking to find are qualities that from your perspective will enable you to feel trust and confidence in your adviser and all the support team.

At the same time, your Genesys Wealth Adviser is seeking to determine if your objectives, requirements and attitudes are complementary to the client service and portfolio management support experience that our office is striving to provide for our valued clients.

The worst outcome for both parties would be a poor marriage of mutual needs, wants and expectations.

Accordingly, to assist in this process, we have outlined the profile of the typical client for whom we believe we can achieve the best results and the most harmonious and enduring relationship.

At Genesys Wealth Advisers Limited, we are dedicated to providing the best advice and highest level of service to clients who:

Place a high value on openness, honesty and integrity and acknowledge that this is a two-way requirement between the client and their adviser.
Have, or are prepared to develop clear financial, personal and lifestyle objectives concerning their future and are prepared to commit to it.
Are seeking a mutually rewarding long-term relationship.
Are seeking strategic and professional financial planning advice concerning wealth creation, tax planning, investment, superannuation, risk management, estate planning and retirement from a well-qualified and experienced adviser.
Require a proactive portfolio management service centred on well researched strategic asset allocation together with well-performed managed funds and with limited exposure to direct share investments.
In relation to investment: <ul style="list-style-type: none">• Do not want to be unnecessarily involved in the day-to-day investment decision-making.• Understand that investment in growth assets such as Australian shares, international shares and property requires a long investment time frame (more than 5 years).• Accept that investment performance in the short term (i.e. less than twelve months) can be relatively volatile resulting in negative returns.• Are comfortable to set portfolio expectations on rolling five to ten-year periods.• Understand that wealth is often passed from the impatient to the patient.
Prefer working with their adviser on a transparent agreed fee basis with full rebate of all initial commissions (as an additional investment).
Are decisive and prepared to accept well researched and reasoned advice, unhesitatingly.
Are more concerned about achievement of their long-term goals and ambitions than primarily focussing on fees, charges and short-term returns.
Will be delighted with service which exceeds expectations and will want to refer Genesys Wealth Advisers to friends, relatives and associates with similar values and expectations.

Genesys Wealth Advisers Limited ABN 20 060 778 216

Australian Financial Services Licence No 232686
Locked Bag 26 Epping NSW 1710 Tel 1800 066 577 (toll free) Fax 02 9869 0842

Chiltern Peak Pty Ltd

Member Firm and Corporate Representative
Suite 3/400 High Street Kew VIC 3101
PO Box 2548 Kew VIC 3101 Tel 03 9852 7500 Fax 03 9852 9922