

The important things in life



We see creating and looking after your wealth as a life long 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.

Whether it's growing a nest egg to buy your first home, or making plans to retire and sail around the world, we all have different ideas about what we want out of life. Genesys Wealth Advisers can help you create the financial security that lets you focus on what is really important in your life.

Who we are

Genesys was created out of two of the best established and most trusted financial planning companies in Australia. Genesys has a network of over 400 financial planners across Australia. We provide financial services to around 100,000 Australians and advise on more than \$7 billion of investments. We have the experience, the knowledge and resources to manage your wealth.

Genesys is owned by Challenger Financial Services, a core provider of financial services.

Our team approach

Every Genesys wealth adviser has access to the strength and resources of Genesys' high quality investment and economic research, risk insurance and financial strategists along with powerful software tools to help establish and manage your investment portfolio. All this, combined with your adviser's expertise and understanding of your specific needs and goals, forms a powerful team working to build and enhance your wealth.

Our values

Genesys is a values-driven group. We emphasise a corporate attitude of honesty and integrity in everything we do. We realise the importance of trust in the relationship between an adviser and their client and seek to build that trust through responsive, personalised and sensitive service and advice. Genesys is a Principal Member of the Financial Planning Association of Australia (FPA) and abides by its Code of Ethics and Rules of Professional Conduct.

What is wealth advice?

Wealth advice is support and guidance on the best way to manage all your finances. Whether it's adjusting your debts to minimise repayments, saving for a home or a holiday, investing money, planning for your retirement, maximising pension entitlements or ensuring your family are protected if something happens to you, the right advice from the right people will help you achieve your goals faster and more effectively.

Our service

In addition to our membership of the FPA, Genesys holds Australian Financial Services Licence Number 232686.

This means our wealth advisers can recommend investments and risk insurance (life, disability, trauma and income protection) from an approved list that includes a broad range of leading financial institutions from Australia and overseas.

Genesys wealth advisers also have access to a comprehensive range of investment management services covering investments, superannuation and retirement. This way, you receive regular, easy-to-understand consolidated reports on your investments. It also provides our advisers with a powerful tool to regularly analyse and review their clients' portfolios to ensure that they continue to meet their investment needs.

Our comprehensive range of services can help you create, manage and protect your wealth. They include:

- Personalised investment portfolio construction
- Retirement planning
- Redundancy advice
- Superannuation
- Pension and allowance maximisation
- Estate planning
- Life insurance
- Access to buying and selling shares
- Investment advice, review, reporting and implementation

At Genesys, we want you to get the most out of life so you can take advantage of any opportunity and be prepared for any challenge – that's what wealth advice is all about.

For more information or to arrange a no-cost, no-obligation first consultation, please contact:
Chiltern Peak Pty Ltd*

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