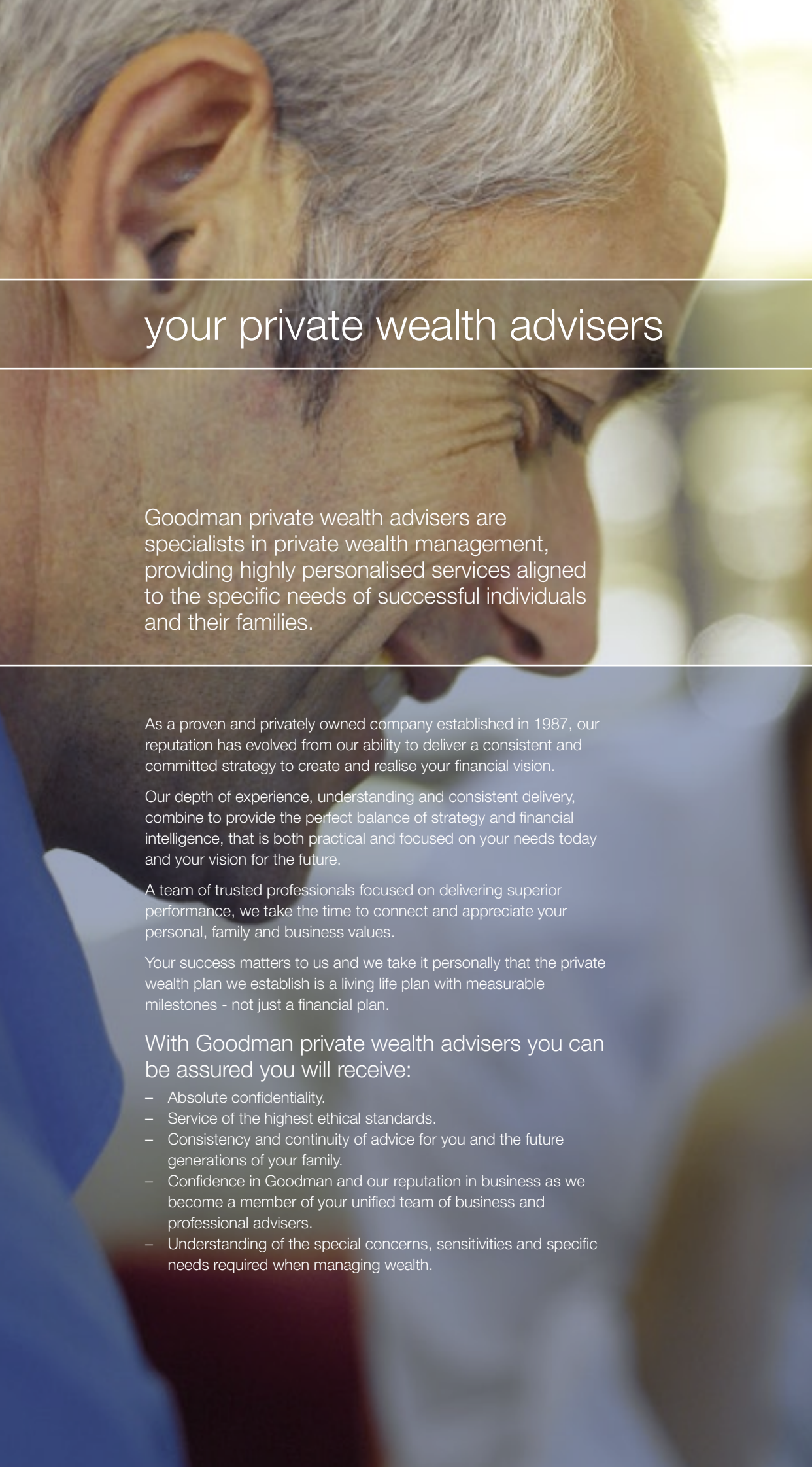


Goodman

private **wealth** advisers



trusted by successful people.



your private wealth advisers

Goodman private wealth advisers are specialists in private wealth management, providing highly personalised services aligned to the specific needs of successful individuals and their families.

As a proven and privately owned company established in 1987, our reputation has evolved from our ability to deliver a consistent and committed strategy to create and realise your financial vision.

Our depth of experience, understanding and consistent delivery, combine to provide the perfect balance of strategy and financial intelligence, that is both practical and focused on your needs today and your vision for the future.

A team of trusted professionals focused on delivering superior performance, we take the time to connect and appreciate your personal, family and business values.

Your success matters to us and we take it personally that the private wealth plan we establish is a living life plan with measurable milestones - not just a financial plan.

With Goodman private wealth advisers you can be assured you will receive:

- Absolute confidentiality.
- Service of the highest ethical standards.
- Consistency and continuity of advice for you and the future generations of your family.
- Confidence in Goodman and our reputation in business as we become a member of your unified team of business and professional advisers.
- Understanding of the special concerns, sensitivities and specific needs required when managing wealth.

valued results

Top tier advice, combined with our unique Value Based Investment Strategy, ensures we embrace your vision and deliver sustainable solutions.

Our proven track record for responsive and personalised advice, together with the highest level of client service has seen our business gain an impressive and growing list of clients in the high net worth sector.

Our own business success is a direct reflection of our client's success. Our partnership will enable you to realise your full wealth potential.

Exclusive Service

We work exclusively with people who, like you, have substantial assets or a high surplus of income to invest. We have a unique understanding of the special concerns and issues you face.

Our client numbers are monitored so you can be assured of prompt and personal attention at all times.

Our Remuneration

Goodman private wealth advisers operates on a professional fee basis and has a strict policy of full disclosure of any relevant interest, with our fees always fully and clearly explained well in advance.



trusted by successful people



“ We were referred by a colleague who is an existing client of Goodman private wealth advisers as we already had a financial adviser who we were not getting a lot of value out of.

In our initial meeting Goodman asked us what’s important and identified the things we were trying to achieve in the short term and the long term. That was quite advantageous not only from their point of view but also from our point of view as it reaffirmed that we were on the same track.

We had a number of meetings with Goodman to discuss their recommendations. They were enthusiastic at those meetings and we felt comfortable dealing with them.

Goodman then wrote to us confirming the recommendations we had agreed to. It has all been very clear. Everything Goodman said they would do, they have done. Furthermore, they followed up on their recommendations and did not let them fall by the wayside.

Whenever we have phoned Goodman someone has always been available to speak with us. They are always responsive and happy to give us the time we need when we need it.

Overall we are very impressed with the service we have received.”



“ I came back from the UK in 1986 and met with my solicitor to prepare a will. I asked him at the time whether he knew of a good financial adviser and he recommended Goodman private wealth advisers.

I liked Goodman’s approach and proposal for the ongoing financial management of my affairs and decided to proceed with their services.

I have been happy with the results ever since. I knew nursing homes and not finance. As far as I am concerned having Goodman private wealth advisers to look after my financial affairs is the only way to go.

I have been with them since 1986 and I am continuing with their services. As a result of the good advice and management of my finances, I have spent a great deal of time traveling. I have visited 50 countries and have been to Antarctica six-times as well as to the Arctic three times.

In my advancing years it has given me a great sense of security knowing that I have sufficient funds to last me for the remainder of my life.”

“ I first went to Goodman in 2003 because I liked the idea of independent advice.

Being a Chartered Accountant myself, it was important to me that I found similarly qualified advisers - and this is what I found in Goodmans and their staff.

Sharing the same background gave me a greater sense of assurance that the firm would live up to their reputation as a good business with a high ethical standing.



I refer many of my clients to Goodman private wealth advisers because I respect their honest advice and upfront fee for service basis. The feedback from my clients is always positive, with many reporting their satisfaction with Goodman’s strong personal attention and professionalism.

From my experience, the firm has been very quick to respond to new client’s requirements and in ensuring their affairs are in order. My clients enjoy the relationship they build with the Goodman advisers and really appreciate the independence of the advice they receive.

Knowing that the firm is not aligned with any other entity, bank or life insurance provider gives them peace of mind that the advice they are receiving has been tailored with their needs as a priority.

The advice the firm gives would also be especially valuable for any business owner in transition from ownership to retirement. From my dealings and those of my referred clients, I’ve found Goodman private wealth advisers to be highly professional, proactive, honest and accessible.”

Partner, Chartered Accounting Firm

it's more than business – it's personal

We understand the issues and questions you will need to consider when selecting your specialist wealth management adviser.



"I need a plan that will identify and incorporate both my own and my families' financial goals, and the strategy we will require to achieve them."

The Goodman team will work with you to develop a private wealth plan tailored specifically to you and your family. A plan that clearly sets out the direction you wish to take and the means of getting there.

"As a successful individual with substantial assets to invest, I require a professional with a multidisciplinary approach and sensitivity to my specific needs."

Your Goodman private wealth adviser is an experienced and knowledgeable professional equipped to recommend and respond to all of your investment needs, including shares.

"I need sound and consistent ongoing advice from my financial adviser."

An experienced support team who know your requirements and who take a personal interest in ensuring that every detail is followed up. By maintaining clear and consistent communication with you on a regular basis, we ensure that the technical investment and family money advice in your private wealth plan remains relevant.

"I need access to a consolidated view of financial statements across all my investments to gain a thorough understanding of my progress and finances."

We provide you with an accurate, secure, and automated process to measure and view a complete overview of your aggregate position so you can see your progress towards your overall objectives.



"I need to simplify my tax planning and preparation."

The Goodman team works closely with your accountant to ensure your tax planning is effective. We provide you with the information that you and your accountant need to complete your tax returns promptly.

"I need to be able to view and monitor how my investments are performing against each other and the performance of my total portfolio against the index."

At Goodman we consolidate the historical positions and transactions from your accounts that are needed for performance analysis. By accurately comparing the performance of your accounts against each other we are able to research how your combined accounts are also performing against the common indices.

"In making referrals to a financial adviser, I need to be confident that the quality of advice and service will result in a positive experience."

As all of our clients are from referrals, we value the trust placed in us and take particular care to ensure that the quality of our service and advice reflects well on the referrer.

"I need my financial adviser to work closely with my other professional advisers including my accountants and lawyers."

By maintaining regular contact with your other professional advisers, we work closely with them to ensure that your estate planning, taxation, business structure, and asset protection are appropriate.



www.goodmanwealth.com.au

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