



Ohlimbos Financial Pty Ltd

Completing your financial puzzle

Quality strategic advice for you

Ohlimbos Financial can help you get there.



Our business

Ohlimbos Financial is a leading financial services provider.

Our role is to help you plan strategies that will allow you to take control of your financial future. We build close relationships with you and your family to secure each generation's financial wellbeing. Our business is all about you.

Our promise to you

At Ohlimbos Financial our aim is to help you achieve financial success and peace of mind by providing a personalised financial strategy.

Our goal is to provide you with a strategic advice plan that will create and protect your wealth over the long term, while dealing with your day to day financial needs and challenges.

We are committed to client service and education. Our qualified advisers have the necessary experience to ensure the best financial outcome for you.

Quality strategic advice puts you in control.

How we can help you

Whether it's to address a specific financial concern or to achieve your life ambitions, we can support you in the following areas:

- . Investment planning
- . Superannuation planning
- . Risk and insurance analysis
- . Business succession planning

Our strategic advice process

We look at your entire financial position, your needs and what you want to achieve in life before helping you plan how to get there. Then we guide you through a simple step-by-step process to create a strategic plan just for you.

- 1** Understanding your goals

Our first meeting will be to discuss your current situation and what you would like to achieve in your financial life. This allows us to clearly understand how strategic advice can benefit you.

- 2** Considering the opportunities & risks

Once we have a clear understanding of your circumstances, goals and attitude to risk, we will investigate the range of strategic advice options available to help you reach your goals.

- 3** Building your strategic advice

Based on our discussions and research we will present you with a customised strategic advice plan that is written clearly with you and your goals in mind, this strategic advice will set you on the path to where you want to be.

- 4** Bringing your plans to life

We will work closely with you to implement your strategic plan step-by-step, this ensures you have as much control as you like, understand and know where your money is going and why.

- 5** Staying on track

Your strategic advice plan will be reviewed at least every second year, you will benefit from our ongoing support and advice. Staying in contact ensures your strategies stay up to date as your life or circumstances change.

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Our commitment to you

It is difficult to predict if and when things may change, and even more difficult to keep up with frequently changing legislation and its implications. We provide strategic review and management of your strategy to ensure your strategic plans stays in pace with your life changes.

Our People

Our advisers are qualified in personal insurance and financial strategies. We are committed to ongoing professional development and education to ensure you have the most up to date technical knowledge and advice specific to your needs. Our experience and knowledge ensures you understand all your options, so you can decide on the best solution for you.

We observe a strict and comprehensive Code of Professional Conduct and are subject to stringent compliance and audit guidelines.

Our availability

You are able to contact us any time, especially if your circumstances change in any way. We are here to support you.

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