# PERSONALISED FINANCIAL ADVICE

*Impartial, innovative, strategic*

newell palmer

*Trusted since 1983*

# Experience to depend upon

Since 1983 clients have been relying on our experience and foresight in strategic wealth management. By identifying their short, medium and long-term needs, our strategies are tailor-made to help build on investments and maintain financial security.

And, by augmenting our in-house expertise with a select group of other proven professionals, we have the talent pool to ensure our solutions are effective, responsive and sustained.

Clients also rely on our guidance with opportunities in both domestic and international markets. Be it banking, equities, property or fixed income investments, they look to Newell Palmer for help in keeping them on track, compliant and informed.

But perhaps the advantage our clients cite most is that of 'having a trusted adviser'. We ensure that there is time to sit with you—to explain, to guide and to recommend.

*We are always professional*
*but we keep it personal.*

# Advice without favour and protection without compromise

## *You can measure our success by that of our clients*

The success of our practice is dependent on our ability to determine what a client needs and formulate a strategy to achieve it, maintain it and build upon it.

## Our history

We established Newell Palmer in 1983 and secured our Australian Financial Service Licence in 1991. Since then we have been renowned for delivering financial advice that is tailored and not influenced.

Being engaged by you and paid by you avoids the conflicts of interest that can cause so much concern. By offering advice that's always personal and building relationships based on trust, we enjoy long and mutually rewarding client engagements.

## Our practice

Unencumbered by restrictions experienced by larger financial institutions, we are free to seek innovative and long term opportunities. Just as our clients are varied and interesting, so are our solutions.

Communication is fundamental to any relationship and we will keep you abreast of progress with your objectives and how it compares with industry benchmarks. And while we embrace technology, it will never come at the expense of your privacy.

## Our people

Are interested in you and in providing a level of service that is expected of a boutique professional advisory firm. Our advisers hold all necessary and relevant qualifications to provide high quality advise and we focus on balancing experience with technical competency. We are experienced in listening and being sensitive to what you say or, sometimes, may not want to say.

## Our process

Identifying your needs and developing a strategy to achieve the outcomes you want lies at the heart of our process. We are skilled in assembling investments and insurance that support our strategy and require clients attend review meetings to ensure that we remain on track or respond to changes along the way. Active on-going financial management and regular face-to-face meetings form an essential part of delivering on our service offering.

**NEWELL PALMER**

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