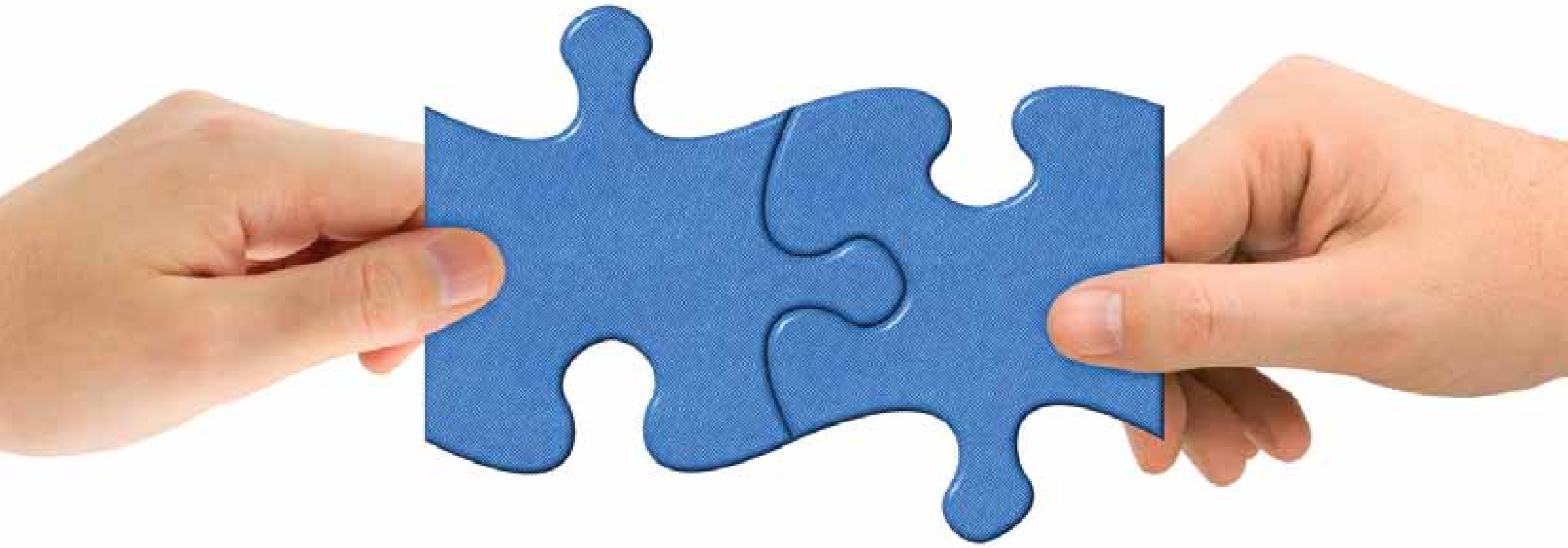
williamgrant Financial Consultant's Partnership Program

An easy way to retain more clients



Help your clients to achieve their financial goals

As a specialist in your field, you can't offer everything that your clients need. But like every business, you want to keep your clients satisfied. How would you like to be able to help secure your clients' financial futures AND increase client retention levels in the process?

williamgrant Financial Consultants is offering businesses like yours the opportunity to team up with a financial services firm that will give your clients advice they can trust.

We offer a comprehensive range of services and our advice is ALWAYS motivated by what's best for your clients.

If you want to offer your clients more than your competitors do, join our Partnership Program today.

williamgrant FINANCIAL CONSULTANTS

What we can do for your clients...

Our personalised, bespoke service offers:

- Retirement planning
- Self managed super
- Superannuation
- Financial coaching
- Investment advice
- Personal insurances
- Tax planning
- Estate planning

Building your peace of mind
today and prosperity for tomorrow

williamgrant FINANCIAL CONSULTANTS

The benefits of an alliance with williamgrant financial consultants

You can trust us to uphold your reputation

Trust is at the core of our ethos, and that's why more and more people are choosing **william**grant's Financial Consultants services. Locally and privately owned, our advice is free from the influence of any bank or financial institution, so your client's best interests ALWAYS come first. Coupled with our commitment to excellence this means that we can provide them with the high-quality service they deserve.

Increase your client satisfaction

williamgrant Financial Consultants can offer financial services that are complementary to what your business offers, which will benefit both you and your clients. By recommending your clients to us you can increase the satisfaction of your clients and, therefore, your client retention levels. You can also ensure that your clients aren't at risk of forming a relationship with another financial planner who might refer them to colleges who provide the same services as you.

Better Qualified to Help

Our advisers are better qualified than most financial planners, giving you confidence that your clients will be properly looked after:

David Jarrott CA, CFP, B.Comm
Bill Jarrott FCPA AFP, Dip Accting
Damian Lyons B.Ec, Dip FP

ALWAYS in the loop

When you direct a client to another business you need to know they're being properly looked after, and what the result of the referral was.

We will update you on the your client's progress on a step by step basis so you'll know exactly where things are at

It's hassle-free

One of the best things about **william**grant's Financial Consultants Partnership Program is that it's really easy to join.

There's no complicated set up process; you can be up and running today. We'll even provide you with material to promote our services to your clients.

What type of businesses partner with us?

The following are just a few of the types of businesses/ professionals that are currently benefiting from an alliance with us:

- Accountants
- Legal firms
- Mortgage brokers
- Stock brokers
- Will and estate planning specialists
- General insurance brokers
- Human resources consultants

"We work hard to help every client meet their financial goals. And the transparent way we do business will give your clients confidence that their finances are being managed properly. A partnership with **william**grant Financial Consultants really will enhance your brand, help you to retain more clients and help you to capitalise on further business opportunities."

Find out how you could benefit from our **Partnership Program**

Visit **www.williamgrant.com.au** or call **08 6282 0170** NOW

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