Leebridge Financial Planners

A Partnership for Success

Leebridge Financial Planners is an affiliate partner of the wider Leebridge Group – a recognised leader in the financial services industry with over 35 years' experience.

At Leebridge Financial Planners, we hold our own independent Australian Financial Services Licence and operate with absolute professional autonomy. Unlike many financial planners, we are under no obligation to direct business to a certain investment sector or fund manager. This gives us maximum flexibility to deliver tailored financial solutions to fit your precise situation.

We believe our holistic approach of working consultatively with your other advisors will guarantee the best possible outcome for you. Together, we can properly assess your goals and create a robust strategy that delivers genuine financial security for your future.

Our services include:

- Unbiased investment advice — listed securities, cash investments and property
- A comprehensive appraisal of your existing investments and strategy|
- Pension strategies
- Retirement planning
- Establishment and administration of Self Managed Superannuation Funds
- Superannuation contribution strategies
- Risk Insurance — Life & Income Protection

Although we work primarily to a Fixed Fee Arrangement (giving you access to financial advice whenever you need it), we also offer an hourly rate arrangement if you prefer.

At Leebridge Financial Planners, we understand the success of our partnership with you is based on a proactive and consultative dialogue. Our advisors communicate in a clear and informative way leaving no room for any doubt or confusion.

In an election year with predicted market volatility, our focus remains on providing investment strategies that perform consistently.

We realise every individual and situation is different and won't make you fit into a predetermined model. Instead, benefit from our extensive experience and let us work tirelessly for you, every time. Leebridge Financial Planners would welcome the opportunity to sit down with you and talk about your goals. We offer an initial 'no fee, no obligation' meeting giving you the chance to freely discuss your situation with us, so we can determine the best way to help you.

"Working with Leebridge Financial Planners, our adviser really took the time to work with us in a genuine partnership; the relationship was educative, so we really understood how our wealth was developing and what was involved. We are a team!"

Ern & Marg Heaven
(retired Hospital Administrator & Kindergarten Teacher)

For more information, please visit leebridgegroup.com.au or call (03) 9854 3100 for a confidential discussion with Financial Planners, Brian Wasley or Lou Guzzardi.

LEEBRIDGE
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