



EQUANIMITY

FINANCIAL SERVICES

Live Your True North, Today

Get the most
out of *tomorrow*

Are You Living Your True North?



We specialise in providing practical financial advice to medical and healthcare professionals who want to grow their wealth, their business, their free time... or all three.

Just as ongoing, proactive decisions about our health have a compound effect on what we get out of life... so it is with money, where small steps today can create exponentially more tomorrow.

So while prevention is better than cure, it's not without it's challenges.

Irrespective of the stage you're at, a lack of practical financial advice makes it harder to grow your wealth, your business or your free time.

Does this sound familiar to you?

Notice how when you're...



A **young professional**, it can be challenging to know how much to save, invest and budget.



Busy **juggling work and family**, it's easy to put off making the most of your money.



Looking to **grow your business**, it can feel a little daunting to branch out with confidence.



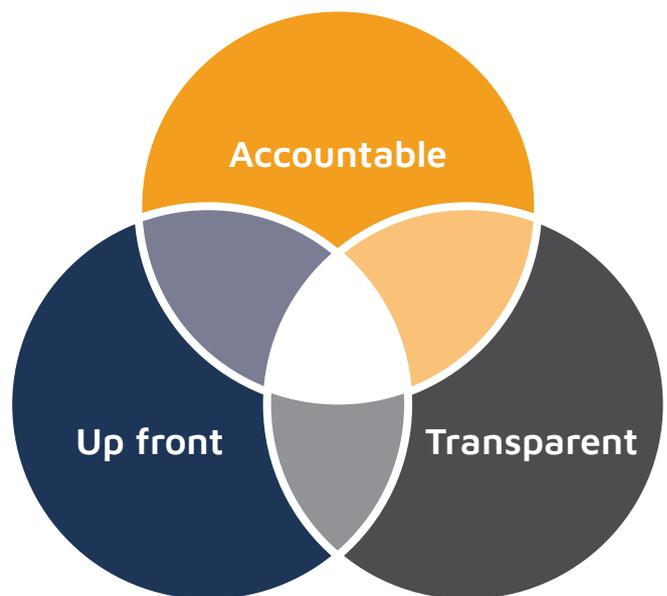
Considering retirement, it's not always easy knowing if you've got the right amount of funds to enjoy it.

Advice Which Puts You First

Equanimity Financial Services was born out of the frustration of seeing Financial Planning practices overcharging and underdelivering. For too long, the sector has been dominated by large institutions and older practices with cumbersome systems.

We believe financial advice should be practical and help more people get the most out of tomorrow. Our clients aren't looking for dodgy shortcuts or exotic get rich quick schemes, appreciating that we're always;

- **Accountable** - placing them at the heart of everything we do
- **Up front** - we don't pretend to be a 'financial unicorn' promising super yachts
- **Transparent** - avoiding any conflicts of interest and simplifying financial matters



We believe financial advice should be practical and help more people get the most out of tomorrow.

We are privately owned, leverage new technology and place our clients at the heart of everything we do. So whether you're starting out or getting out... we're here to help you to get money smart, grow your business and get the good life.

"I refer Alex because he has an in-depth knowledge and always sticks true to his word." - Brent Edwards

Associations



Placing You At The Heart Of Everything We Do



1 Clarify (our first consultation is complimentary)

What's most important to you and where you're heading? What obstacles do we need to avoid to stay on course for your True North?

2 Calibrate

Research and due diligence to ensure our advice recommendations align with your goals and values, so you're well placed to achieve them and realise your ambition.

3 Construct

Profile your investment tolerance, communicate any risks up front and select the right investments for you using Industry leading research.

4 Create

Create a vision for your financial future and lifestyle and the strategic support required to achieve it, so you don't put this one in the 'too hard basket'.

Our advice and service methodology is our 'signature approach', specifically designed to ensure we always place you at the heart of everything we do.

5 Continue

Regular reviews of your portfolio will keep you up to date, fully informed and on course for your True North because while financial matters can be complex, we're here to simplify them.

So whether you're looking to grow your wealth, your business or your free time our 'signature approach' will ensure we always place you at the heart of everything we do so you can get the most out of tomorrow and live your True North, today.

Our Investment Philosophy

1 Investors First

2 Keep It Simple

3 Minimise Risk

4 World Leading Research

5 Maximise Value

“Alex always delivers on his service and goes that extra mile to ensure we’re looked after and taken care of – I highly recommend him.” – Geoff and Regina Devitt

Financial Planners for Good

At Equanimity, we believe every business has the power to change lives by integrating giving into its' everyday activities.

Thanks to our partnership with global giving initiative B1G1, we contribute a percentage of our ongoing revenue to vetted, high-impact projects supporting people and communities worldwide which makes a big impact to people who need it most.

Thank you for helping us make a real difference.



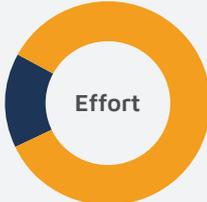
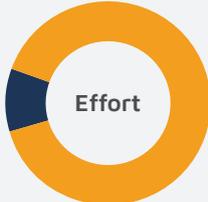
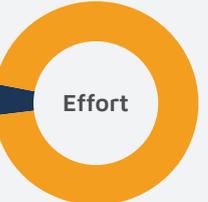
THE GLOBAL GOALS
For Sustainable Development

PLEDGE
1%



True North Wealth Program



	Starting Out	Sorting Out	Branching Out	Getting Out
<i>Notice when you're...</i>	A Young Professional	Juggling Work & Family	Growing Your Business	Considering Retirement
<i>You'd like to...</i>	Be Money Smart From The Start	Grow Wealth & Reduce Risk	Have Confidence To Grow	Have The Funds To Enjoy It
<i>Then you'd get a ...</i>	Budget, Strategy & Financial Plan	Wealth Creation & Protection Plan	Business Protection & Investment Plan	Superannuation & Retirement Plan
<i>So you can...</i>	Get Your First Property	Grow Wealth & Protect Family	Grow Your Business With Confidence	Enjoy The Good Life
				

■ You
■ Equanimity

Our initial consultation is complimentary and all our clients enjoy access to a portal where they can store their financial records, view their investments and review their situation every 12 months. Our packages vary in complexity of advice and frequency of reviews to suit your circumstances.

Grow Your Wealth, Your Business & Your Free Time

Financial decisions can sometimes end up in the 'too hard basket' because the negative implications aren't immediately obvious, the payoff seems too far away and it can all feel a little daunting.

Just as prevention is better than cure however, so it is with money.

This is your invitation to get the most out of tomorrow and live your True North, today.

Financial Strengths Self-Evaluation

Take the first step to getting the most out of tomorrow, by taking our quick quiz today.

To live your True North, your goal is 15 points.

1 = No/Don't Know **2** = Sometimes/Think So **3** = Yes/Absolutely

- I've clarified my future cash flow so I can achieve my goals and realise my potential
1 | 2 | 3
- I'm comfortable with my investment decisions and sleep well at night
1 | 2 | 3
- I've taken preventative measures to protect my family's and stakeholder's welfare
1 | 2 | 3
- I know how to accelerate my wealth while minimising my tax so I have more time with family
1 | 2 | 3
- I'm creating a retirement nest egg so my capital lasts well and truly into my golden years
1 | 2 | 3

If you're scored less than 15 points, let's talk.



Find Your Financial Centre

Ultimately, it's about having the freedom to live life on your terms...whether that's growing your wealth, growing your business or growing your free time.

So whether you're starting out, branching out or getting out...we're here to help you get money smart, grow your business and get the good life.

Every experience is better when it's shared, so contact Alex to find your 'True North' - based in Manly and servicing clients Australia wide.

Connect with us   

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