JBS FINANCIAL STRATEGISTS COMPANY PROFILE

CREATE PROTECT ENJOY

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JBS Financial Strategists Pty Ltd
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JBS Financial Strategists

CREATE | PROTECT | ENJOY

WHO ARE WE?

We are JBS Financial Strategists, a leading, Melbourne-based, boutique financial planning business. We're about building a better tomorrow for you today, and helping you achieve everything that's important to you in life. We understand that everyone has a different 'big picture', so we provide highly personalised financial planning strategies to help you get there, with a focus on families and individuals over the age of 45, pre-retirees, and retirees, small business owners and executives. We'll remove all your worry and stress while you join us on a fun journey as part of the JBS team, to create long-term wealth, to protect yourself, your family and your investments, and to position yourself to enjoy your success – our three key ideals. Welcome to JBS!

WE SPECIALISE IN THE FOLLOWING AREAS:

- Financial planning
- Self-Managed Super Funds
- Superannuation
- Risk management
- Investment advice
- Direct shares and term deposits
- Cash Flow Management
- Aged Care
- Estate Planning

SO WHY US?

Making life easy for our clients is at the heart of everything we do at JBS. We want to take the stress and hassle out of managing the big things, so you can feel reassured and comfortable that we have everything under control. We'll open your eyes to a world of new strategic opportunities, so join us on a fun journey!

Just like no two people are the same, no piece of advice is the same either. Our clients are unique, so we tailor our solutions to your personal situation. We pride ourselves on finding out what's really important to you, and working towards achieving this with our range of services and team of expert staff. Our advice is 100 per cent unbiased too, so we have complete freedom to choose the best strategies, solutions and products for your situation.

Our services are sensible, easy to understand and comprehensive. Our founder, Jenny Brown is a leading, respected and award-winning financial services adviser within the professional and business community around Australia and internationally. We are also proud members of the Most Trusted Advisers network within Australia.

We are licensed through JBS Financial Strategists Pty Ltd (AFSL 486 674).

SO WHAT ARE OUR SERVICES?

Financial planning

A financial plan is a roadmap that bridges the gap between what you have and what you want. Our well-developed process will create an individual financial plan for you that reflects your own needs, so you can sit back, relax and let us set you up for life.

Superannuation

If you'd like your retirement to look like endless summers and poolside pina coladas, it pays to plan early. At JBS, we'll manage every step of planning for your retirement, so you can work towards a secure and happy retirement free from financial stress. We can work with your existing super fund manager, and advise you on the best home for your super.

Self-Managed Super Funds

With our guidance, we'll open the door to a whole new world of SMSF opportunities for you. We've got the knowledge and know-how to guide you towards strategies that'll build wealth in a more cost effective way, with a portfolio of tailored investments that not only reflect your risk profile, but also your investment preferences and tax situation.

Risk management

We'll sit down with you and advise you on the correct policy, and manage the entire process so that your family, your business and investments are securely protected for whatever life throws at you. In the event of a claim, we will help remove the financial burden at an often stressful time. We will allow you to focus on what is important, making a full recovery.

We take it seriously – so you can have peace of mind.

Investment advice

Our investment team is qualified and accredited to provide direct investment portfolio advice. We get the highly complex nature of investment markets, and are able to tailor a specific portfolio of investments to your specific needs and objectives. We will tell it to you straight with the right steps if you're ready to invest a little or a lot. We'll make sure our advice matches your investment and lifestyle objectives too.

Direct shares and term deposits

Our team is accredited to provide advice in both direct shares and term deposits, which can be incorporated into a strategic financial plan or isolated to provide pure share advice.

Cash Flow Management

If you struggle to manage your money and wonder where your savings disappear to each month, fear not! Our comprehensive program will put you back into the driving seat, using high impact tracking and reporting technology teamed with expert advice. We'll help you get your finances on track, so you can achieve your goals, plan for the future and say hello to a happier, healthier life where YOU are in control.

Estate Planning

Estate planning is a crucial aspect of your financial strategy that requires careful consideration and planning. Every individual has unique financial, family, and work circumstances that need to be taken into account when creating an effective estate plan. Our aim is through our network of relationships to assist you in navigating through the complexities of estate planning, so you can achieve peace of mind knowing that your affairs are in order.

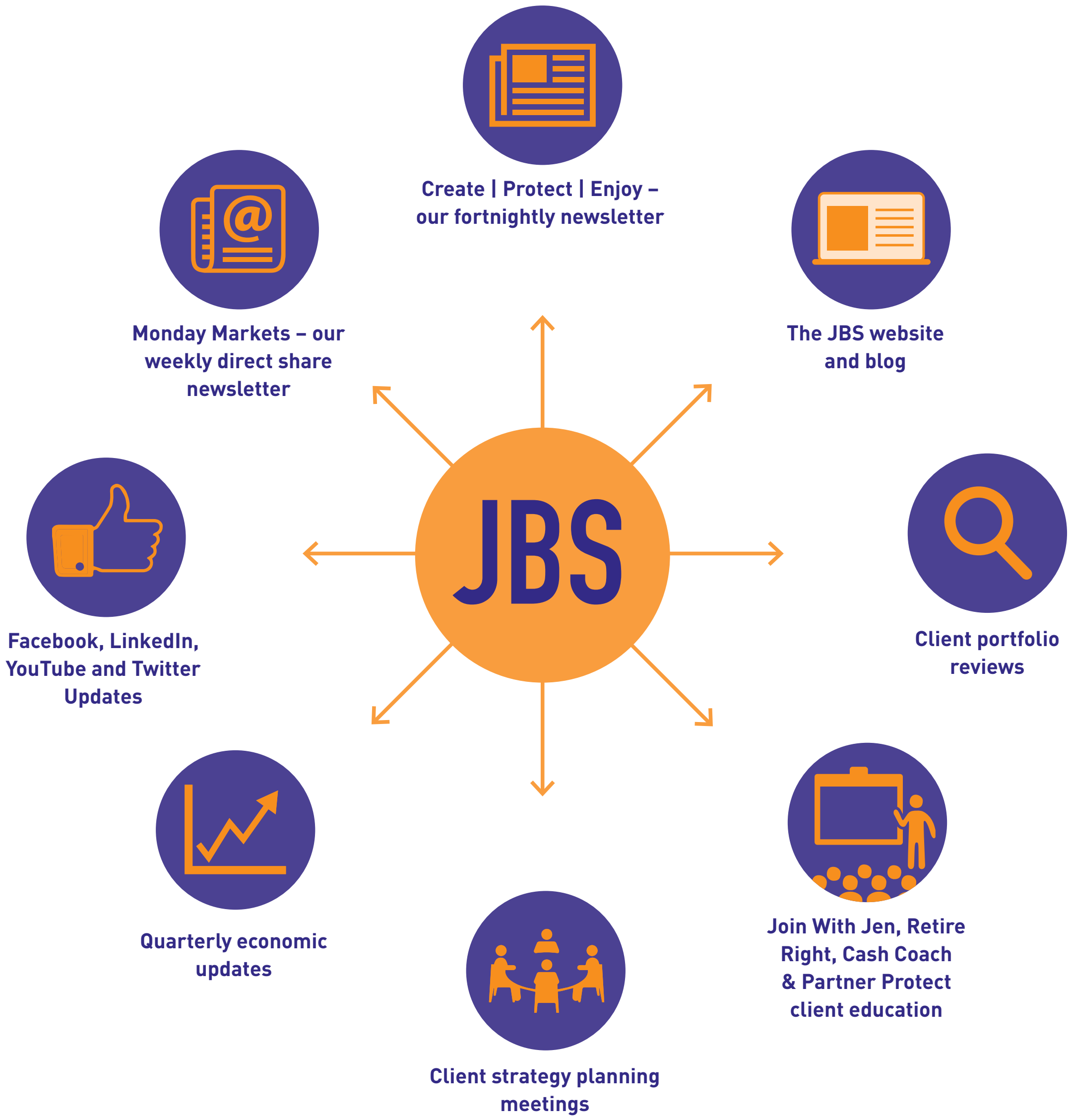
Aged Care

Navigating the aged care system can be a daunting task, whether you need assistance in your own home or are considering moving into an aged care facility. Our team understands the complexities of the aged care system and is here to help. We provide tailored aged care advice, taking into account each individual's unique situation. Our aim is to guide and educate you throughout the process, so you can make informed decisions about your future care with confidence.

THE JBS DIFFERENCE!

We're committed to keeping you in the loop with all things financial planning and providing great information we think might be helpful as we begin our relationship together.

We also regularly review our own strategies by asking our clients what they think of what we're doing. It helps to keep us accountable! Some of the ways we keep in touch with you regularly include:



WHAT'S THE FIRST STEP?

Initial meeting on us
A two-hour meeting at our cost, where we will get to know you and fully understand what you are looking for.

File note
Within a week after your initial meeting, we'll send you a detailed file note and terms of engagement. This will form the stepping stone prior to our Statement of Advice which will set out our strategies, services we can offer you and the associated costs

Acceptance
Once you've reviewed the documents and are happy with everything, return the signed terms of engagement, and we're all set!

HOW MUCH DOES IT COST?

We charge a Fee for Service for our advice (excluding risk insurance), and our prices are extremely competitive in the market.

We are not affiliated with any product providers and have the freedom to advise as we see fit.

WHAT ABOUT FINANCIAL PLANNING?

Assess
Once we've got all our information about you, we'll assess where you are and how this relates to your lifestyle goals.

Prepare
We'll get to work! As part of the process, we'll research, analyse and compare a range of strategies to see which is the best fit for you, with a summary, advice document and our recommendations to help with cash flow, outcomes and objectives that are measured against your goals and what's achievable.

Present
This is the exciting bit. We'll sit down with you and present the financial plan we've created, allowing you the space and time to ask us any questions you like so that you're comfortable with what's on the table.

Implement
Once you're happy, we'll get the ball rolling, including completing and lodging application paperwork.

Review
Your circumstances, lifestyle and financial goals are likely to change over time, so it's important your financial plan is regularly reviewed, to make sure you keep on track.

Educate
It is important that you fully understand our recommendations and how they will assist you in meeting your financial & lifestyle goals. Financial literacy is extremely important to us and we are committed to educating you in areas we feel are appropriate to firstly help you understand our advice and for you to make more informed financial decisions in the future.

LET'S SWEETEN THE DEAL FOR YOU

Everyone in our team is committed to helping you achieve your lifestyle goals. That's why we offer a range of services to help you get there. Our aim is to get to know you, understand your unique wants and desires and create a personalised plan for you, with full support whenever you need it.

While we take our work seriously, we're a fun bunch too! Our team is young and we love to try new things, such as bubble soccer and Tough Mudder, as well as sharing our adventures and achievements on our various social media platforms. We've won awards for our engagement with social media, and we also like to post news and insights on life at JBS.

We see our role as continuing to provide considered financial planning advice and risk management to care for your needs. In doing so, we'll ensure you can get back to the more fun things in life, safe in the knowledge that your money is in the best hands.

MEET THE TEAM

JENNY BROWN
Founder & CEO
CFP Fellow SSA Grad Dip FP FChFP GAICD

WARREN HANNA
Partner
B.Bus.FinPlan

PETER FOLK
Partner
B.Bus.FinPlan

DANIEL SANTOPIETRO
Financial Adviser
B.Bus.FinPlan/B.Bus Acc

KAITLIN MIFSUD
Provisional Financial Adviser
B. Bus (FinPlan) B.Bus (Acc)

SHARYN EVANS
Practice Manager

TANAKA CHIVAZVE
Client Services
B. Bus (FinPlan) B.Bus (Acc)

GERALDINE CANETE
Client Services

RODELYN CABRERA
Client Services

TIN SOSMENA
Processing Administrator

CASSANDRA CIRILLO
Administrative Assistant

TED
Senior Executive in charge of Fun and Frivolity
Phd F.U.N

YOUR FUTURE
RETIRE IN FRANCE
PLAN
CASH FLOW
NEST EGG
WHICH FUND TO CHOOSE?
NEW BUSINESS

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