



*Welcome to Ellice-Flint*

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# Time poor, but still want to maintain control?

## Ellice-Flint Group is your dedicated team of advisers.

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### **Make the most of opportunity**

For the majority of executives, professionals and retirees, paying the right amount of attention to your financial affairs is difficult, and opportunities to enhance and protect your wealth too often get missed. As an Ellice-Flint Group client, we are constantly monitoring and managing your financial affairs leaving you more time to focus on what is important to you and your family. Our services will ensure that we are on top of all your finances while you are able to attend to your own personal commitments.

### **Holistic Approach**

The Ellice-Flint Group is a private advisory firm that has its own AFS License. A boutique financial service offering with Chartered Accountants, Financial Planners and other Specialists working together to help you simplify your finances and add value to your portfolio. We are 100% focused on you, your wealth creation and wealth protection to provide the most favourable outcomes for you financially and personally.

### **Performance**

Our disciplined investment selection and monitoring process forms the foundation of our portfolio return. We have access to specialised investment products typically not available to individual investors, supported by multiple layers of internal and external research.

### **Advanced Planning Strategies and Investment Selection**

In this area we offer the expertise and flexibility that the bigger institutions find difficult to provide. Accordingly, our financial planning and investment solutions are more tailored to meet your personal requirements.

### **Structuring**

Utilising the accounting/advisory team's skills, your structure is reviewed to maximise the efficiency of your wealth.

### **Communication and Team Approach**

Our team works together to ensure we get your complete financial universe organised which we believe is an important prerequisite to maximising wealth. Ongoing administration, timely reporting and client interaction are key components of our ongoing service. We will also take care of all administration functions with accounting compliance needs at the end of each financial year.

### **Have Control**

Stay in control of all your affairs and financial future, including lifestyle assets. You will always be informed and have full transparency across your portfolio and financial affairs. While most other firms only advise in investible assets, at Ellice-Flint we take care of all your assets.

### **We Save You Time**

Time is your most precious asset. We save you time by acting as your financial gatekeeper. By intercepting all investment requests and providing

advice and direction, we ensure you can continue to focus on what is most important or pressing, such as that family event, progressing your career or focusing on growing a successful business.

### **Consistency and Experience**

Our dedicated and loyal employees have extensive proven expertise and industry leading qualifications.

### **Fees**

We create a simple fee structure and clearly articulate our fee arrangements with clients.

# Why work with Ellice-Flint Group?

Trust and integrity are values we are proud to uphold. Ellice-Flint Group is comprised of Ellice-Flint and Co Chartered Accountants and Ellice-Flint Financial Planning, a corporate authorised representative of EFDB Pty Ltd.

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## **Integrity and Trust**

- Protecting client interests for over a decade.
- Adhering to high ethical standards.
- Holding the utmost honesty and respect for our clients.
- Focusing on our clients' goals and objectives.

## **Performance**

- Managing client portfolios with disciplined and proven investment selection process.
- Providing access to specialised investment products not generally available to retail investors.
- Utilising the most advanced tools and technology.

## **Quality**

We believe financial advice should simplify, not complicate, our clients' lives. We continue to strive for a high standard of excellence. We display this by:

- Endeavouring to hire the best and brightest talents.
- Analysing investment alternatives to identify a history of competitive performance.
- Providing thorough, easy-to-understand recommendations and research results.

## **Service**

Our clients can expect:

- One stop, holistic point of contact and comprehensive administration service.
- Our focus is on building a long-term successful relationship.
- Nothing less than the most courteous and respectful conduct from all employees and partners associated with our firm.
- Quick and efficient resolution to every inquiry or concern.
- Caring, personal attention to their individual needs and circumstances.

## **Confidentiality**

We respect your privacy and appreciate your trust.

We honour our clients' privacy by:

- Safeguarding your personal and financial information.
- Not releasing your information to third parties unless authorised by you.

*We have a formidable record of delivering personalised and intelligent strategies to help clients build, manage and maintain their wealth.*

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# Services

Ellice-Flint Group offers a complete financial planning, wealth management and protection service. We can assist you with all of the following:

## Financial and Retirement Planning

What is most important to you? We focus on your personal circumstances, risk tolerance and financial needs. We give advice and direction on:

- Structural Advice e.g. Trusts, SMSF or individual
- Planning for Retirement
- Transitioning into Retirement
- Self-Managed Superannuation Fund (SMSF)
- Aged Care
- Multi Family Office Services
- Portfolio Management
- Investment Opportunities and Funds
- Cash Flow and Tax Planning
- Asset Protection and Trusts
- Philanthropic Strategy
- Redundancy Advice
- Executive Advisory
- Expatriate Services

## Tax Services

- Provision of management & statutory reporting
- Proactive advice on business development and succession planning
- Assistance in appropriate tax minimisation strategies and structures
- Administration of small/medium size businesses ongoing compliance and investment portfolios
- Working with international tax consultants

## Superannuation and Self-Managed Superannuation


We can help you design your own Self-Managed Super Fund (SMSF) or assist in administration of your super across other funds. Our services include:

- Roll-overs
- Investment Strategy
- Company Super Funds
- Employee Benefits

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**ELLICE-FLINT**  
**FINANCIAL PLANNING**

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### **Portfolio and Financial Administration Management – Family Office Services**

We offer a unique service offering total administration of all your financial affairs. We are a central contact point for you and we have the ability to orchestrate all meetings with other required specialists.

### **Estate Planning and Generational Change**

Working with our trusted legal partners we provide you with peace of mind when it comes to your estate including:

- Structuring of assets and trusts
- Wills
- Maximising the value of your estate
- Minimising taxes and expenses

### **Life and Disability Insurances**

We have experienced specialist insurance advisers who can provide advice to ensure you have the most appropriate protection for your family and business. We can assist you with:

- Life Insurance
- Total and Permanent Disability Insurance
- Trauma Insurance
- Group Insurance
- Income Protection Insurance
- Business Insurance:
  - Protect your key people
  - Protect your business expenses
  - Financial protection for your equity partners

### **Lending Solutions**

We can assist you with finding the ideal finance for your home, business, investment or other personal needs.

*Time is your most precious asset. We save you time by acting as your financial gatekeeper.*

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## Financial Services

Provided by Ellice-Flint Financial Planning

- Financial and Retirement Planning
- Superannuation and Self-Managed Superannuation Funds
- Portfolio and Financial Administration Management – Family Office Services
- Life and Disability Insurances
- Estate Planning and Generational Change
- Mortgages/Lending Solutions via referral partners

## Tax and Business Services

Provided by Ellice-Flint & Co Chartered Accountants

- Preparation of all types of tax returns, financial statements, BAS & IAS
- Executive and Salary packaging
- Advice on buying, selling and starting a new business
- Tax planning
- Business structures
- Bookkeeping Advice

Specialist in discretionary trusts, fixed trusts, companies and DIY Super Funds

Proudly sponsoring:

- CP Alliance
- Giant Steps

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