



Adrian Bernard

Bachelor International Finance
& Diploma of Financial Planning



Profile

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Background :: It's has genuinely been my goal to help people and work in the financial services industry from a young age; the industry seemed very exciting and challenging. I began in the financial planning industry in 1999 as a 'trainee' Financial Planner after completing my degree in International Finance at Griffith University.

I soon established a growing client base and now solely work with referral clients. While working in the industry I have attained the PS 146 and diploma of financial planning requirements. I have developed a broad experience in asset accumulation tax & risk management for both personal and companies.

I get great satisfaction in improving my client's financial security and quality of their live. To this end my business operates exclusively on referral and strategic partners'.

Passionate :: About life and the opportunity to assist people from all walks of life to improve their financial situation and giving them confidence to improve their lives.

Personal :: When out of the office I enjoy getting back to nature. I especially enjoy the Gold Coast beaches for surfing and Hinterland for bush walking and photography. I enjoying travelling and going to the snow in Japan for the contrast and culture.

Languages :: I have studied Mandarin Chinese for 7 years and also speak some basic Japanese and have an interest in politics and geography as economise are driven by people. The region we live in is dynamic and it's important to be aware of where we are headed and how these changes can benefit clients.

What we do is :: A full and detailed assessment of where you are at now both financially and personally and professionally. We then discuss you goals and objectives and define where you want to be in the future both financially and personally taking into consideration your time frame risk profile stated preferences we develop a unique financial plan that is specifically designed to assist you achieve your financial goals.

So that we can :: By having a plan in place to achieving your goals this offers peace of mind for you and your family's future, knowing that all your hard work now will actually yield you your desired lifestyle.

Which means :: You can get on with the rest of your life and focus on your family and career and other personal aspirations knowing that your financial security is being looked after and regularly reviewed.



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Please complete this short survey enabling us to better understand your needs.

1. If you accumulate as many NET assets in the NEXT five years as you just did in the LAST five years, are you going to be satisfied with your progress at that point?

- Yes No
 I don't know – show me more

2. Is the difference between what you OWN and what you OWE getting WIDER, NARROWER or STAYING THE SAME?

- Getting wider Getting narrower
 Staying the same I don't know – my financial advisor hasn't shown me lately

3. How many weeks of your typical month in retirement are FULLY funded by your current plans (based on date of retirement until end of projected life expectancy):

- First week only Two weeks
 Three weeks All four weeks
 I don't know – help me to find out

4. Does your current life insurance pay you immediately to stay at home on the diagnosis of critical illness – or would you have to go to work whilst critically ill?

- Pays me to stay at home whilst recovering
 I would still have to go to work
 I have no idea – please evaluate my situation with no obligation

5. Have you had a super health check recently? Do you have multiple funds? Do you know what your fund has invested in and the investment strategy? Do you know what your fund will be worth at retirement based on your current investment strategy?

- Yes, I need a super health check No, I think I have all these matters covered

Name _____ Contact Phone _____

Email Address _____

Comments _____