

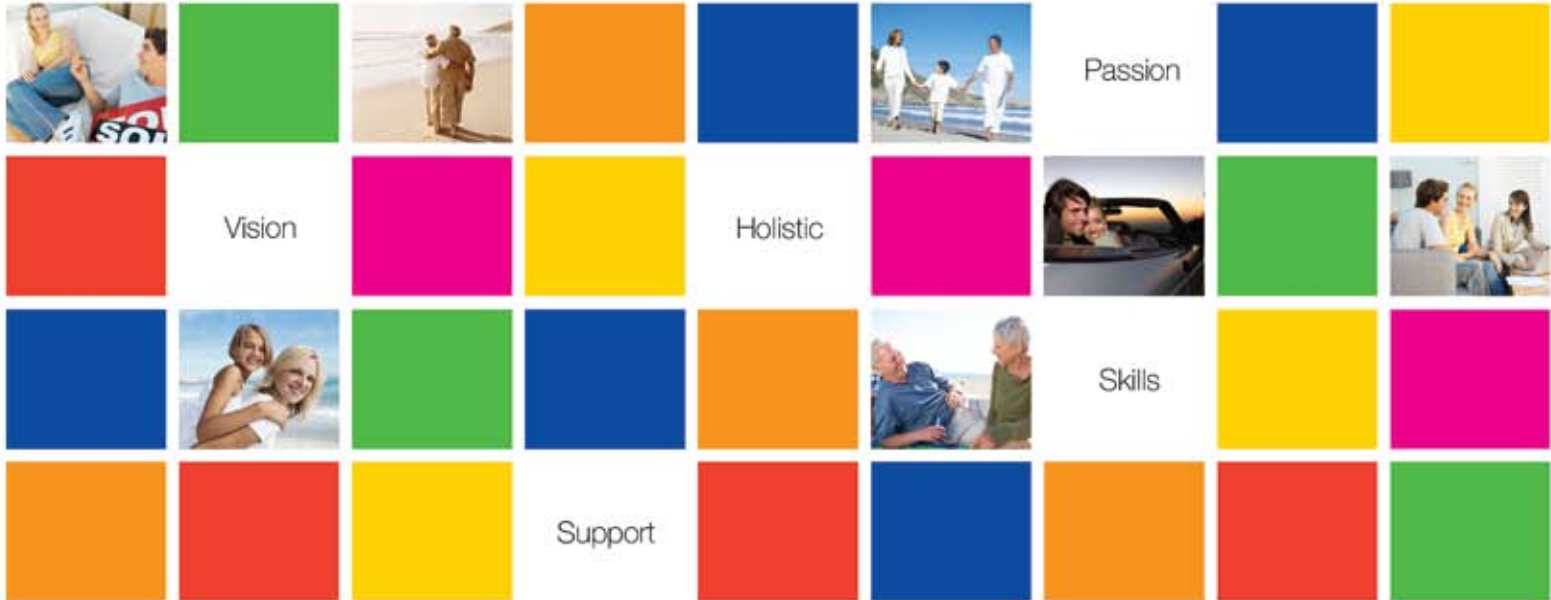


Professional Investment Services

Testimonials

Accountant

Don't just take our word for it ...





Successful



Read what our existing accountants say about us...

"It is with great pleasure that we provide this testimonial to Professional Investment Services (PIS).

Davidsons has been associated with PIS since 1999. At the time we were a regional accounting firm of some 45 people seeking a financial planning solution.

We were introduced to the Group by our planners and after meeting senior executives had no hesitation in signing up. What appealed to us was the fact that despite PIS' size we were still able to communicate directly with management. They could all empathise with us and understand the challenges we faced as practitioners.

We now comprise of over 70 staff with two regional offices and an office in Melbourne. We have grown alongside PIS and currently have five authorised representatives plus support staff.

Over the years we have received ongoing support from PIS and they are without doubt the leader in accountant/adviser liaison.

A great example of this is the structure of the PIS conferences to which we annually send both advisers and accountants. Whilst many in the industry perceive conferences as a holiday, this is far from the case with PIS. Sure there are social events of an evening, but during the day there are extremely well structured and informative learning sessions, based around challenging case studies. These sessions are enhanced by having accountants, financial planners and risk specialists in each work group to share their expertise. Following this up with social events adds further to the networking within the Group. The contacts we have made within the PIS network have been invaluable.

I would be more than pleased to personally discuss our experiences with you."

Peter Rankin - Victoria

Davidsons - Accountants and Business Consultants

"NCA is an innovative accounting firm based in Jolimont, Western Australia, with a dedicated focus on achieving financial goals for our clientele, being small to medium size businesses.

While accounting and taxation are our core services, we believe that for clients to achieve their financial and life goals they must be provided with additional services such as financial planning and business coaching.

PIS was instrumental in assisting NCA at the commencement of our financial planning business some ten years ago.

PIS supported us in the development of the business model and key performance indicators for a successful financial planning practice. We cannot speak highly enough of PIS' role as a mentor and business coach and we only now appreciate the true value after transforming our practice to offer business consulting/mentoring services to our clients.

NCA has always been encouraged and supported by PIS. The Group offers great marketing initiatives and provides excellent guest speakers, venues, systems and staff at seminars. The team at PIS has always been professional, proactive and accommodating in all areas including training, legal, compliance, ethics, marketing and networking, and we feel they have helped us enjoy the journey to becoming a successful financial planning business.

Our experience with PIS and the team has been one of mutual benefit. Our key objective is to focus on the achievement of clients' financial goals, which has resulted in a successful financial planning business that benefits both NCA and PIS.

We are extremely proud of our association with PIS and have no hesitation in recommending the Group to other accounting firms."

James Newcombe - Western Australia

NCA Accountants



Leaders





Vision



"2IC Management formed a relationship with a financial planner, Ramana Rao from Metaplanners in 2001. The association started slowly while each party tested the other out. Eventually we entered into a PIS Branch Agreement which has developed into a very successful model. Although we have achieved significant financial success, the real win has been for our clients and their appreciation for the full array of services we can offer.

During our development of the financial planning offering we have been constantly supported by PIS. PIS has been willing to provide guest speakers at seminars, have a business development manager available to train our team, be available to discuss issues and run regular training sessions and seminars.

As PIS has grown I have been impressed that the senior management are still available to take a call and deal with members face to face. Ian Rudd from the State Branch and Grahame Evans, Managing Director, have always had time if approached, and if needed, Robbie Bennetts, Chief Executive Officer, is equally accommodating."

Geoff Richmond - South Australia

2·1·C Management Pty Ltd

Don't just take our word for it...

"BCP Group Services, is a large integrated financial services Group based in the Macarthur region of Sydney. PIS has been the licensee of our financial planning unit for some ten years and during that time we have fashioned a genuinely strong relationship between our respective businesses.

Reflecting on the reasons why our relationship has grown so positively leads me to a few key elements. PIS has an excellent culture whereby you feel there is a real concern for positive outcomes. As a stakeholder the sense of effective "inclusion" in the model is very strong. A definite sense of purpose exists together with a confidence to pursue and value opportunity. Linking closely with "culture" is the fact we have been able to develop excellent relationships with their network of professional advisers from quite diverse disciplines, and key PIS staff.

Amongst professionals and the independent businesses you can experience an environment of sharing ideas and issues. This is valuable to those who actively participate and gives substantial reward whether you may be the beneficiary of an idea or the provider of help to others. BCP has developed real friendships and quality peer relationships as a result of this.

We find that PIS personnel demonstrate a team approach that values both the overall Group achievement while recognising the individual skill sets and contributions. Best of all, PIS develops its people within the organisation whenever possible.

PIS is not afraid to take leadership on industry issues, and they have developed internally a very competent management and executive team who are accessible when you need to speak with them.

Being a highly ethical business ourselves, which promotes the idea of clients' interests being paramount, we have found an excellent compliance partner in PIS. They are both experienced and professional in their approach.

In summary, we are proud of our relationship with PIS and can recommend them to potential network members or employees. If you have a genuine interest to succeed and embrace the culture you should be suitably rewarded."

Rob Burns - New South Wales

BCP Group Services Pty Ltd



Passion



Training





Professional Investment Services

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