

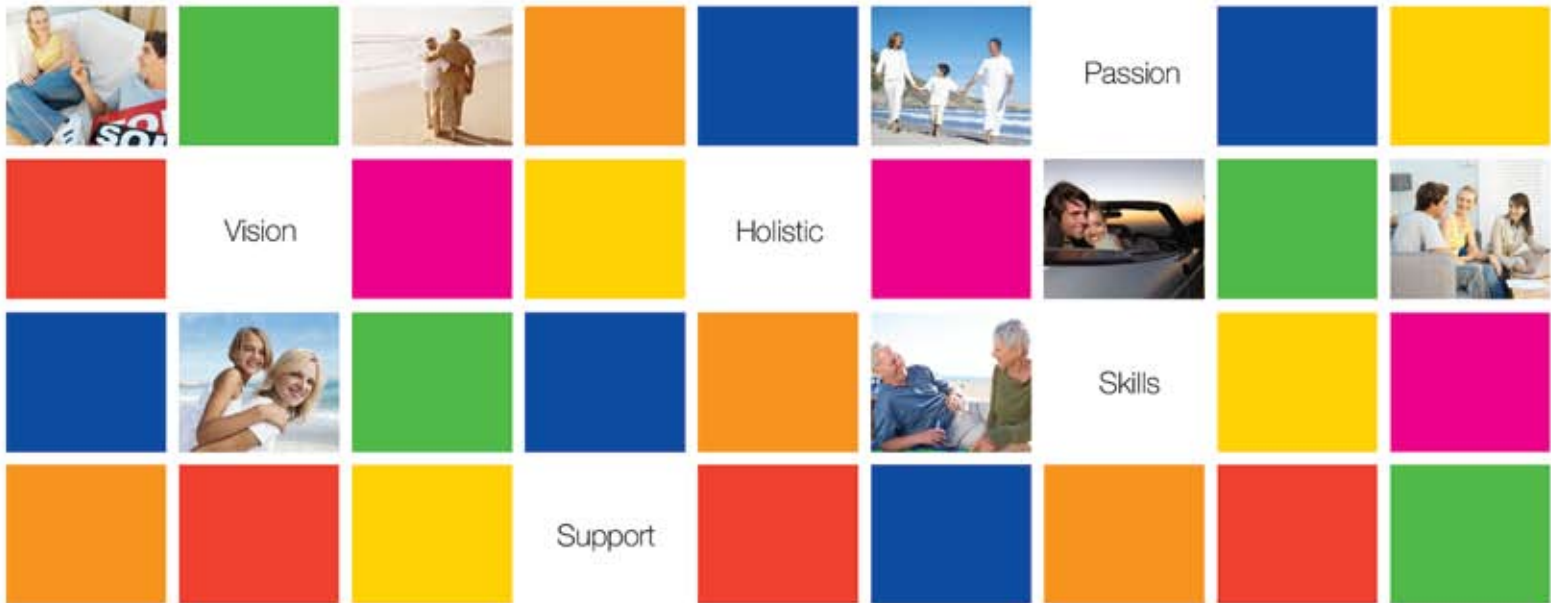


Professional Investment Services

Adviser

Testimonials

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





Successful



Read what our existing advisers say about us...

"Metaplanners joined Professional Investment Services (PIS) as a member firm in March 2001. Our reasons for the move from our previous dealer group, in no order of priority, were PIS' promise that they would work with and for us to help us become a stronger and more robust business; their 'can do' attitude towards all things and although they had a well defined model of how the business might run and how things 'ought' to be done, they were quite happy to debate and discuss issues we raised with an openness that engendered mutual trust and the feeling that we were in this 'voyage' together. Finally, the promise that we would together build a business that would benefit all participants. Each of us had the opportunity of owning a part of the enterprise and we were all on the same page heading north.

The results speak for themselves. Metaplanners was, as my wife liked to call us, a 'three-piece band' consisting of myself and two support staff. We are now a team of 22 people; 5 advisers and 17 support staff including a dedicated CEO who looks after the 'business' of being in business. It is with some pride that I can say Metaplanners is now one of the top producing businesses for PIS in Australia.

The PIS model works for many reasons. Each of us in the PIS family will, I'm sure, have different views on why the model works for them, but the important thing is that it works! Knowing the people charged with its stewardship, I have no doubt that PIS will continue to deliver well into the future."

Ramana Rao - South Australia

Metaplanners

2008 PIS Adviser of the Year

"I have been associated with PIS for a number of years now and have been a member since I first began my career as a financial planner.

Over the years, PIS has given me and our firm Invest WA, a great amount of support and has helped us to grow into a successful practice offering financial planning, insurance and through Australian Loan Company (ALCo), finance broking services.

PIS has provided a significant amount of assistance in the areas of: staff training and recruitment, professional development, business expansion and compliance. The support we have received from the business development team has been critical in our business growth.

PIS offers a comprehensive, well researched Approved Product List (APL) giving us plenty of options to choose from to meet our clients' needs and objectives.

One of the best things about PIS is that they help us to create activity and implement it. This is in regard to systems and procedures, business planning, generating income through client seminars and assistance in building our referral networks.

Our success has enabled us to become shareholders both in PIS and ALCo which we consider to be a great asset. We get to share in the overall success of the Group which means we all work as a team to benefit all members.

PIS is continually looking for new initiatives to enhance the value for everyone in the organisation. They are keen and proactive in helping us grow our business and I am sure will continue to be of great benefit to us into the future."

Marc Butler - Western Australia

Invest WA Pty Ltd



Leaders





Vision



“Since April 2000 I have been an authorised representative of PIS and along with our other financial planner, Mr Pat Kelly and four staff I operate the financial planning division of the accounting firm Peak Partnership.

Over this time, we have worked closely with a range of highly professional people within PIS to improve our business and the quality of service we provide to our clients.

The “activity and networking” model encouraged by PIS has been the mainstay of our practice over this period. The PIS model encourages interaction between advisers, the accounting partners and staff, with a view to providing high quality financial services to clients. The business development team has always been willing to assist us with our client seminar program and other activities we undertake throughout the year.

The networking opportunities provided at PIS conferences, Strategic Review events and PD Days have proved invaluable to both the financial planning practice and the accounting firm, allowing us to pick up new and successful ideas from experienced operators within the Group.

As our business has grown, the software tools provided by PIS, together with the prompt and very accurate remuneration processing system have allowed us to maintain good financial control over our business.

Staff training and education is also an area that has required attention as our business has grown and we have taken advantage of the educational programs within PIS to encourage our staff to learn all they can about the industry. PIS also assisted us in teaming up with a successful and highly motivated risk writer. This relationship provides great peace of mind knowing that our clients’ risk needs are always taken care of.

2008 has been an incredibly tough year for the industry, but PIS has remained focused with continuous network support and encouragement to its advisers and accountants within the Group.”

Mike Blessington - Queensland

EPK Financial Planning Pty Ltd

“Our firm began its relationship with PIS almost eight years ago. During this time we have been able to observe, experience and test all the elements that make PIS what it is today. There are two pieces of this puzzle that stand out and are quintessentially PIS.

Firstly, the culture of the organisation is very different to anything I have ever seen or experienced in my business dealings. PIS has a unique style and vibe all of its own. This is demonstrated in the way in which the advisers, staff, management, strategic partners and fund managers all feel part of the journey. As a result, there is an environment of cooperation, sharing, encouragement and concern on intellectual, financial and social levels.

The second element is the level of passion and commitment that is applied to any willing business within the organisation by the distribution staff, senior management and staff at PIS Head Office.

This is typified by the degree of commitment shown by all levels of staff to the approach of the ‘Activity Train’ with any and all practices. This alone has been of significant benefit to our business and will benefit any practice that invests the resources to make it happen.

When we joined we had four full-time staff. The business has evolved and today we have 29 full-time staff. We are still enjoying the journey!”

Tony Devin - Victoria

Lawford Devin and Associates



Passion



Training





Professional Investment Services

Head Office

Level 14
 Corporate Centre One
 Cnr Bundall Rd & Slatyer Ave
 Bundall Qld 4217

Phone: 07 5574 0244
 Fax: 07 5574 0180
 Web: www.profinvest.com.au

ABN. 11 074 608 558 / AFSL. 234951

