



Professional Investment Services

Insurance

Testimonials

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





Successful



Read what our existing advisers say about us...

“Professional Investment Services (PIS) has been instrumental in our growth as a specialist risk practice.

The huge network of accountants and financial planners provide an abundance of potential referrals.

Whilst we only specialise in risk insurance, PIS provides a fantastic opportunity to network with accountants and financial planners. We have been able to develop these relationships and secure regular client referrals.

The PIS conferences also provide great opportunities to build associations with planners and accountants.

PIS has now become a significant player in the risk arena – as indicated by the NMG reports* which named PIS as the number one risk producer for the last 12 months.

I would recommend any risk adviser to strongly consider the opportunities within the PIS network. The largest Australian licensee provides the largest opportunities.”

Troy Edmondson - Queensland

Business and Estate Planning Specialists - AFA Adviser of the Year 2006

* NMG Financial Services Consulting is a multi-national consultancy that focuses exclusively on the insurance and wealth management segments. According to NMG's Risk Distribution Monitor survey (NMG reports), Professional Investment Services outperformed other industry contenders for four quarters in 07/08.

“We joined Professional Investment Services in 2000, having been associated with a sister company for five years.

Having explored a range of dealer groups we decided that PIS offered the best value solution for us as risk advisers and financial planners.

PIS is a key partner in our business, assisting us in all aspects of building our business for the long term. The staff at PIS provide prompt, friendly and efficient service, focusing on continuous improvements for our business.

The ongoing professional development allows us to maintain our high level of knowledge and gives us the opportunity to build relationships with other advisers, to share ideas and develop working partnerships.

We recommend PIS as an ideal partner for any client focused business looking to grow and improve in the future.”

Phillip Heath - Victoria

PHA Financial Solutions

“I joined Metaplanners, a prominent South Australian PIS member firm in December 2006 after being in the industry for some 12 or so years. During that time I have been associated with several practices and dealer groups. Metaplanners and PIS are light years ahead of my previous associations.

The professional environment and support provided enables me as a senior adviser to achieve significantly better outcomes in terms of professional development, knowledge and revenue. Of equal or greater importance is my ability to deliver a significantly enhanced and sophisticated service offering to my many clients.

Clients benefit from the knowledge and skills we gain as a result of our involvement in the many regular professional development days facilitated by PIS and the access to specialised technical support. They benefit directly from the high quality and researched financial solutions we are able to provide.

In addition to technical support, the team at the local PIS office is always available to assist with the ongoing training of our staff, seminars, workshops and specific topic driven briefings for staff, clients and referral partners alike.”

Barry Murray - South Australia

Metaplanners



Leaders





Vision



“While I use Professional Investment Services to ensure I run a professional practice, for me, PIS provide two very distinct services which set them apart from other licensees. Noall & Co. has a staff of around 10 and for a small business like mine, what is invaluable is the strength and backing that a large organisation like PIS can provide.

The first example is tendering for group insurance contracts to large corporates of 100 staff or more. To be able to compete against the large consulting groups, we must show the extent of our resources and back office support. With the help of PIS’ corporate standing we have been able to be very successful in this specialised area.

The other area is the security a large organisation like PIS can provide a risk adviser. Any adviser with a large client base providing insurance services will at one time have a complicated claim. All the analysis, advice and compliance procedures could have been followed correctly, but some clients will unfortunately try to non-disclose. When the claim arises and the insurance company understandably declines, you then have a client who even though wrong, still feels he is entitled to something and threatens action, against the insurance company and you. You feel extremely vulnerable knowing your business, your reputation and livelihood are at stake. It is at these times where PIS is at its best as they can provide the legal assistance and re-assurance to get through such a claim.

While I have had great support from PIS in helping grow my business on a day to day basis from recruiting, training and compliance, it is when you are tested that you really know how invaluable and helpful PIS can be as your licensee and business partner.”

Marc Bineham - New South Wales

Noall & Co

“I joined Professional Investment Services after ten years as a ‘Tied Agent’ and four years as a ‘Managing Agent’. I joined the Group because I felt they offered me the kind of support I needed to build a unique business platform. Furthermore, the people behind PIS impressed me as they are individuals who could and would go the extra mile for the adviser. With the help of PIS I have built the business I wanted and still enjoy excellent support from the PIS team.

There are several aspects of my relationship with PIS which stand out. Almost every facet of an adviser’s function has the support of PIS. Whether that is unique product knowledge, product application, problem solving or one-off issues, there is always a member of the PIS team capable and willing to assist.

Another important part of life at PIS is the array of educational conferences the Group offers. PIS conferences are not “junkets” as often thought by those who don’t understand the PIS philosophy, but a dedicated work program mixed with social interaction amongst fellow advisers and PIS staff. PIS has developed a unique but important agenda for conferences ensuring all attendees experience maximum gains.

In addition to this, PIS has developed an excellent compliance team who ensure advisers have the best opportunity to give the correct and appropriate advice to their clients. The compliance team educate the network without the “big stick” approach, making sure advisers are minimising any regulatory risks to their business and financial stability.

PIS has offices all over the world and in each Australian State. As a PIS adviser, I’ve had the unique opportunity to work together with fellow advisers who have specialty skill sets. This has proven to be extremely beneficial as I have been able to present to organisations with the back up of other PIS advisers, to support the representation and implementation process.

Whilst I can only speak from my personal experiences, I am convinced that any adviser wishing to grow their business with the support of a team of dedicated professional managers should certainly be considering PIS.”

Brian Walton - Western Australia

Westguard Management Services



Passion



Training





Professional Investment Services

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