Plough, seed, weed and reap the rewards.

Money management doesn't have to be a mystery or a burden. Money can be cultivated; The Wealth Farmer way.

- **Ploughing** – preparing everything, laying the groundwork, listening, asking questions
- **Seeding** – providing education, information so that you can make decisions
- **Feeding** – continue to challenge, transform your beliefs and help reflect.
- **Reaping** – the financial benefits of being money stress free

Working with The Wealth Farmer is a continuous process. We educate and prepare our clients so that the knowledge we impart empowers them to spread their own investment wings. Our journey together, as client and coach, is a shared responsibility. The coach's responsibility is to educate the client; the client provides informed consent for recommendations made.

TheWealthFarmer.™

"During our time with Eric we have seen our portfolios grow and mature steadily in all invested sectors, and in volatile markets like these that is no easy feat. That is solely a testament to the advice and structure Eric has put in place for us and our investments."

WORKING WITH THE WEALTH FARMER

Working together to achieve your financial goals is a continuous process. Here are some of the steps along the way.

Stage 1: Discovery meeting
We spend considerable time discovering 'how you want life to be' and gathering necessary information about you – your current circumstances, family, business, work, finances, assets and liabilities.

A detailed questionnaire covers all aspects of your financial life.

- Specifying needs and objectives
- Identifying personal values
- Identifying specific lifestyle goals.

We identify the issues that relate to you (for instance, you may need estate planning or tax planning). Issues are prioritised, then we investigate solutions, develop plan/s and produce a strategy.

Stage 2: Engagement meeting
This is our opportunity to make sure that we truly understand your situation. We discuss your hopes and dreams for life now, in three years and ten years.

At this stage we agree how we will work together so that we can truly operate as an active partner in helping you to achieve your life goals.

Stage 3: Strategy check-in meeting
We provide a concise outline of your issues (determined from the discovery phase) and advice covering issues such as asset protection, growth and distribution. Typically this advice will be a combination of our input and recommendations together with advice from other professionals such as your accountant and solicitor.

The advice provides a solid cornerstone of your strategy for the future. You receive detailed cash flow projections to help you make informed 'trade-offs' on decisions which affect your ability to achieve your goals.

Peace of mind is all about having the confidence that you are on track to achieving your lifestyle goals and fulfilling 'how you want life to be'.

Stage 4: Advice presentation
Following your acceptance of our advice, we arrange for recommendations to be implemented. This involves co-ordinating the services of necessary professionals (as agreed by you). This is where we also commit to an agreed action plan.

Stage 5: Annual review
Together we review your investment performance and portfolio. We track your progress towards the way you want to live against agreed milestones in your game plan. We identify key risks in your plan and update goals appropriately.

Stage 6: Annual review follow-up
We revisit your life plan. We talk about new goals and discuss your portfolio. We discuss our proposed strategy revisions and agree to future action.

The Wealth Farmer: what we do

- Wealth creation coaching
- Self-managed super fund (SMSF) advice
- Financial security
- Retirement planning
- Estate planning
- Family succession financial planning
- Wealth protection.

10-week program: Back to Financial Health

The Wealth Farmer 10-week program is designed to help you quickly regain some control of your personal finances.

One-on-one, Eric will discuss with you:

- Meeting loan payments
- Servicing credit card debt
- Managing day-to-day living costs.

Once you have addressed the immediate financial considerations, you will move into the planning stage, covering topics such as:

- Purchasing a property
- Superannuation and investments
- Wealth protection and replacement income.

Tailored approach to wealth management

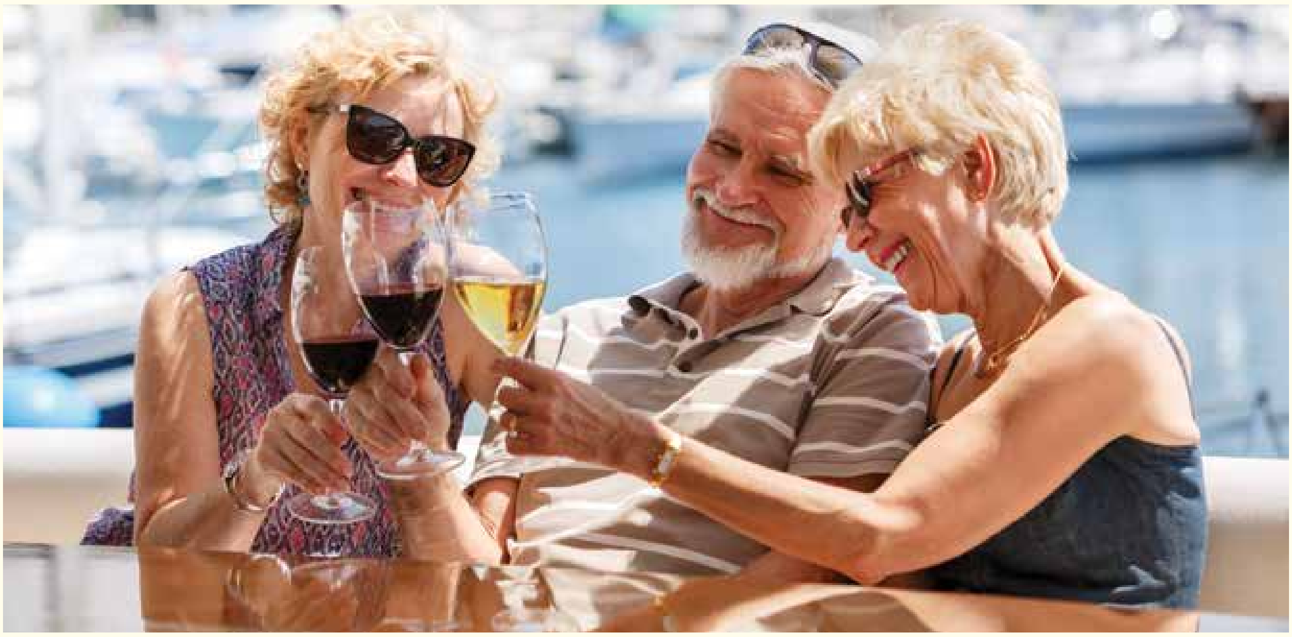
Our Private Wealth Program is a six-step process that has your interests, your goals and your life aspirations at its heart. It is a complete advice offering. One of its most valuable outcomes is delivering to you a comprehensive financial road map, action plans, and guidance to help you achieve your lifestyle and financial goals. Under this program we also project manage agreed actions.

Importantly, the program helps us to define and agree where you are headed and how to get you there. It is purpose designed to monitor and provide greater certainty in your dynamic life circumstances.

It sets the broad picture against which we measure our success and plan for the best outcomes possible. Each year an agreed agenda provides you with life choices and, as we get it right, the confidence to achieve your goals. We ask that you commit to regular meetings and engage in open discussion.

The program may require us to bring in specialist services: like-minded professionals who will help us achieve your ultimate goals.

> "Eric is helping my wife and I understand how to grow and protect our assets not just for our benefit but also for future generations."



ABOUT THE WEALTH FARMER

Plough, seed, weed and reap the rewards.

Eric Priebee, The Wealth Farmer, is a seasoned Financial Advisor, based in Bowral and working with clients throughout Australia. Eric has over 30 years experience in the financial services sector, including with big name corporates like BNP Paribas and Merrill Lynch.

He works one-on-one with his clients to deliver solutions that are a best-fit for them; and for them alone. Eric's approach with clients is flexible, open-minded, impartial and transparent.

You may even find that some of your long-held, financial goals change after a session with The Wealth Farmer.
He isn't here to just tick the boxes; he is here to empower his client's financially and ask the tough questions.

"Eric is a pleasure to know, a true pinnacle example of what a financial advisor should be."

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