

Why should you choose a Count Adviser at CBC Financial Advisers?



Member of
Count
Your peace of mind is our goal

For over 30 years Count has been behind the provision of written Statements of Advice (Financial Plans) to help Australians reach their goals with peace of mind.

We're on your side

Count is not owned by a financial institution (eg Bank, Life Insurance Company or Fund Manager). After listening to you, CBC will recommend investments based on their suitability to your specific needs... not the financial interests of a parent company! Count is Australia's largest **independently-owned** network of financial planning Accountants and Financial Advisers.

Highly experienced professionals

To be eligible to join the Count network, Advisers must meet strict criteria and undergo comprehensive, ongoing training and audits.

Stringent research process

Each and every Financial product Count recommends has passed a thorough research process starting with an independent assessment undertaken by van Eyk Research. As a result CBC does not recommend investments that we would not invest our own money in.

Pay less tax

Working directly with Accountants we understand tax and can ensure you take advantage of strategies to legally reduce tax – advice most financial planners are not qualified to give!

Contact us

FreeCall: 1800 622 892 Email: cbc@cbc.com.au Web: www.cbc.com.au

There is more than one way to invest with us... you have a choice of quality fund managers, operate your own self-managed super fund; invest in retail funds, direct shares, listed property; invest via our preferred administration platforms. We can recommend a strategy to help build and protect your wealth for years to come...

Save you money

Our fees are very competitive and you have the benefit of ongoing, professional, tax-effective advice!

Save you time

Our comprehensive advice saves you time and the hassle of visiting a number of different financial professionals. We can advise you on comprehensive Financial Planning, Investments, Loans and Wealth Protection.

Big enough to trust

Your Count adviser at CBC is backed up by Count Financial Limited - a public company listed on the ASX – established in 1980.



Top 5 Planning Groups	Product Manufacturer?
1. Professional Investment Services	Yes
2. AMP	Yes
3. Count Financial Limited	No
4. Westpac	Yes
5. AXA	Yes

Source: Money Management dealer group survey 2006

Count is Australia's largest independently owned network of financial planning Accountants and Advisers, and the third largest network overall.

Small enough to care

Each Count franchisee is independently owned and operates in their local community advising their clients.

Your one-stop financial shop to a secure financial future!

Financial Planning

CBC Financial Advisers can prepare a financial plan that, with ongoing reviews ensures you are financially comfortable.

Even if you think you already have an effective investment strategy in place, review it. Why? Because changes in economic conditions or personal circumstances can have a dramatic effect on the performance of your investments. Reviewing your strategy is a vital part of successful personal financial management.

Superannuation and Retirement Planning

Superannuation is the most tax-advantaged investment vehicle in Australia – and with the Australian Government unable to support the rising number of retirees through the Age Pension, it is now one of the most important investments you will ever own.

CBC can help you plan for your retirement to ensure you enjoy maximum security and comfort and minimum tax.

Home and Investment Loans

To ensure your loan is both competitive and appropriate to your needs, Count reviewed the home loan market and has selected the best residential mortgages from a range of lenders for CBC to use. So, whether you're buying your home or an investment property, we can help you select a home loan that is right for you and structured to be tax-effective and paid off as quickly as possible.

Estate Planning

CBC can help you with estate planning, and ensure it minimises tax for your beneficiaries.

Wealth Protection – Personal Insurance

Reducing financial risk is the first step of a financial plan. It helps provide for your loved ones, protects your current wealth and lifestyle and gives you peace of mind for the future. We can recommend the right Income Protection, Trauma and Life Insurance Policy to ensure you and your families are always fully protected.

Business Loans and Leasing

At CBC we can assist you to select and process your Asset Purchase, Chattel Mortgage, Consumer Car Loan, Financing Lease, Novated Lease or Operating Lease for your new car, boat, office equipment, industrial or farm machinery etc! Access a competitive quote from six leading providers in under two minutes by contacting our Leasing Manager Mrs Yolla Nohra. If you have received a recent quote, call Yolla to compare and you will discover just how much we can save you.

We can also arrange loans to finance new business investments for expansion and acquisition, working capital or to restructure your existing borrowings.

Why Choose Us?

- As a Member of Count, Australia's largest independently owned network of financial planning accountants and advisers, we are not aligned with any financial institution. This means we can recommend investment strategies and products based on your specific needs.
- We are a one-stop financial shop. So when you need the services and advice of a professional accountant or qualified financial adviser, you can talk to both at the same time.



Member of
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