HILLROSS
Professional Wealth Management

ENRIZEN
FINANCIAL

Financial advice that's right for you

Everyone needs financial advice

Financial planning is an area many people find difficult to come to grips with, but without a structured plan for your finances, you're unlikely to build wealth and secure your future.

Our key objective is to apply a totally personal approach to each client. In other words, we make it our business to understand your specific likes and / or business goals, so that we can build a strategy that will deliver results, while protecting your assets and minimizing risk.

Our clients

Our success is dependent on building strong relationships with our clients, who come from all walks of life, and have one thing in common – the desire to build their wealth and take control of their financial future.

We help our client meet all their needs, whether building their wealth, protecting what they've accumulated, preparing for retirement, or planning to maximise the wealth that is transferred from one generation to the next.

Our passion for excellence is driven by our Managing Director, Trent Franklin, who sits on the Australian Olympic Committee board and is a Dual Olympian in Water Polo.

"We help you plan and manage your financial situation so you can build wealth, enjoy life and achieve financial security."

How we can help

We provide our clients with a comprehensive range of wealth management solutions through specialist, comprehensive advice strategies and access to an extensive range of quality product solutions selected to align with the strategies we recommend.

We identify proactive solutions, indentify opportunities to meet your needs, which are flexible enough to respond to the ever-changing market and environment.

Our advisers are supported with extensive research resources, enabling us to have confidence in our product recommendations to you.

About our practice

Our financial planning practice provide our clients with some of the highest levels of expertise and service in the market. We partner with our clients to understand their needs to develop strategies that meet their financial and lifestyle needs.

Operating in the corporate and personal demographics, Enrizen has the ability to service large corporate, their individual staff and "mums and dads" Australia-wide

Our business is supported by Hillross as the holder of an Australian Financial Services Licence, which ensures our conduct is exemplary, our systems are sound, our technical knowledge and advise are always up-to-date and our business complies with the Australian Securities and Investment Commission regulations (ASIC).

Our relationship with Hillross

Hillross Financial Services Limited was established in 1987 and has build a reputation of being one of Australia's most successful financial planning groups. Hillross looks after nearly $11 billion in client funds and has over 300 financial advisers, supporting individuals and businesses across the country. Financial advisers undergo stringent assessment before being accepted to operate as an Authorised Representative of Hillross Financial.

Hillross supports its network of financial advisers by providing product research, technical support, legislative compliance advice, professional development and account management.

Experience the difference

Our fundamental objectives are to help build, manage, protect your wealth and provide tailored advice based on your individual needs and situation.

We can offer advice on:

- Pre and post retirement planning
- Corporate and personal risk management
- Superannuation consulting
- Financial strategies
- Wealth accumulation
- Estate planning and succession planning

Access to a broad range of investment products and services

As Authorised Representatives of Hillross, we are able to access and provide advice on over 1,200 financial products and services from leading Australian and International product providers.

Hillross uses research houses such as Van Eyk and S&P, some of the most respected and independent research houses in the industry.

Costs

The first meeting is at our expense. At that meeting we will provide you with a fee schedule including the client service agreement. We also ensure that all our fees and charges are easy to understand and are fully disclosed to you.

Our 7-step process to achieve your financial success

Step 1 We will help you perform your own financial "stock take"

Step 2 Together we identify and review you goals

Step 3 We will develop a strategy to meet your needs

Step 4 Together we can discuss the recommendations and refine them where appropriate

Step 5 We obtain your agreement to implement the recommendations

Step 6 We implement the recommendations

Step 7 Together we review your needs on an ongoing basis

Testimonials

"It's essential that I have the confidence that my investments are placed in good hand and over the years Enrizen has earned my trust."

Phillip Tarrant – Many, NSW

"We are delighted in our decision to engage Enrizen to our company's Corporate Superannuation and Group Income Protection. Since they have come on board as our adviser they have been able to further demonstrate to our staff that we are an employer of choice."

Craig Eastick – Rohlig Australia

"Take control of your financial goals – start by arranging your initial meeting – ring us now!"

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