

# Norfolk Wealth Financial Advisers

## About us

Norfolk Wealth is a boutique financial planning practice located at Trinity Beach, on the Northern Beaches of Cairns. We provide diverse financial planning strategies to a broad range of clients located around Australia.

Our objective is to form long term partnerships with our clients, working with them to identify their life goals and create financial strategies to achieve them.

As our client our focus will always be on you; your goals, your objectives, your needs.

We offer professional, strategic advice in a range of areas including wealth building, superannuation, self-managed superannuation funds, mortgage broking, investments, insurance advice and retirement planning.



### Wealth Accumulation



- Superannuation
- Investments
- Gearing
- Managed funds and direct equities

### Superannuation and account-based pensions



- Investment advice
- Fund review
- Consolidation
- Investment selection
- Contribution maximisation
- Superannuation strategies

### Retirement and aged care



- Pre-retirement wealth accumulation
- Retirement income streams
- Investment strategies
- Transition to retirement
- Aged care advice

### Business succession



- Business insurance
- Risk insurance and structure

### Risk insurance



- Income protection
- Trauma insurance
- Life insurance
- Total & permanent disability Insurance

## The financial advice process

Our financial planners will take you through a six step process:-

1.	Gather financial information about you, your background, investment objectives, risk tolerance and existing investment pattern.
2.	Identify your financial and lifestyle goals through a comprehensive Client Profiling exercise that helps us to evaluate your risk appetite and understand your objectives
3.	Identify any financial issues
4.	Prepare a plan that will outline a personalized financial strategy which will identify appropriate investments, as well as look at any social security issues, risk management and taxation planning. It will also detail the benefits, features and fees. The result is a holistic financial solution presented in a detailed written report, called the Statement of Advice.
5.	Implement the plan
6.	Provide an ongoing review so that the plan can be revised at regular intervals or when you experience life changes. This includes understanding any changes to your circumstances which may affect your long-term plan, provide written updates about the economic environment or legislative changes that may impact on your strategy, offer additional advice about your investment portfolio and recommend changes to your investment strategy and/or investment portfolio.

## Contact us

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### Paul Brown MFP JP (Qualified)

Paul, who holds a Masters of Financial Planning from the University of the Sunshine Coast, has been practising financial planning in Cairns since 2001. Paul established Norfolk Wealth, a boutique financial planning practice, as his desire was to work with a smaller group of clients, form long term relationships and provide them with sound, comprehensive advice to help them achieve their life goals.

Paul is an authorised representative of Consultum Financial Advisers Pty Ltd, An associate Financial Planner with the Financial Planning Association of Australia (FPA), An Australian Credit Representative of IOOF Finance Choice Pty Ltd, a Member of Mortgage and Finance Association of Australia (MFAA) and a Registered Tax (Financial) Adviser.

### Jodi Brown JP (Qualified)

Jodi, who holds a Certificate IV in Finance and Mortgage Broking Management from Kaplan, has been working with Norfolk Wealth for over 8 years.

With a background in business management for both large international corporations and smaller boutique businesses, Jodi is passionate about providing professional and personally tailored service to her clients, ensuring they get the very best loan on the market suited to their individual needs.

Jodi is a member of the Finance Brokers Association of Australia and Credit and Investment Ombudsman Limited.

### Rebecca Templeton JP (Qualified)

Rebecca, who holds a Certificate IV in Financial Services and a Certificate III in Business Administration from Swinburne University, brings more than 10 years senior administrative experience to Norfolk Wealth.

With a background in retail banking and accounting, financial planning was the natural progression for Rebecca and allows her the opportunity to build long-term relationships with our clients and give them the knowledge and tools they need to achieve their financial goals.

People are Rebecca's passion, and her commitment to providing the best service experience for our clients is demonstrated through her continued education. She upholds the highest standards of compliance, honesty and integrity.