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## **1. LICENSING – WHY WEALTHSURE?**

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Under our licence with WealthSure we are able to provide our clients with non-institutional financial advice and give them access to a broad range of independently researched investment opportunities and administration systems.

WealthSure is independently owned and is a principal member of the Association of Independently Owned Financial Planners (AIOFP).

We found WealthSure to be a good fit because they will enable us to give our clients access to the types of good quality investments referred to earlier in this report. They have an impressive investment offering including an extensive range of listed shares.

WealthSure is committed to seeking out the best available resources to support advisers and acknowledge that these may come from many parts of the market. As there are no related party obligations or requirements, WealthSure remains free to choose the optimal blend of inhouse specialists, intelligent systems and selected external resources. This blend is expected to change over time as improved suppliers become available in the market and additional inhouse specialists are appointed.

WealthSure has authorised advisers in New South Wales, Queensland, Victoria, and ACT, and is committed to providing superior support services for its advisers.