

Financial Planning



**Tasmanian
Perpetual
Trustees**

Our commitment to you

At all times the interests of our client will be paramount. The resources of Tasmanian Perpetual Trustees will be devoted to providing financial planning services that aim to achieve the agreed life goals of our client by applying the combined experience, expertise and stability of this organisation.

We will maintain open and clear communication.

At all times we will strive to give our client the benefit of every advantage inherent in the strength and security of Tasmanian Perpetual Trustees.

Tasmanian Perpetual Trustees has a strong reputation for successful financial planning. It is built on a solid foundation of long term stability and security.

The prime consideration of Tasmanian Perpetual Trustees is a constant commitment to providing you, our client, with a financial plan created to suit your specific financial objectives. To do so, we will call on all the financial planning resources of Tasmanian Perpetual Trustees, including national and global financial partners and associates.

To promote your best interests Tasmanian Perpetual Trustees will focus on lifetime service.

The Financial Planning team at Tasmanian Perpetual Trustees has been selected to provide you with a combination of experience and expertise.

They also have access to 'in-house' specialists in trustee services, estate planning, taxation services, lending and funds management.

Importantly, you are guaranteed that all fees are detailed in any Statement of Advice issued by your Tasmanian Perpetual Trustees Financial Planner.

The documentation provided to you will be, wherever possible, written in 'plain English' that gives simple, clear and concise explanations.

As a client of Tasmanian Perpetual Trustees and through our partnership with Bendigo Bank, you gain the added benefit of access to the full range of complementary banking products and services available at Tasmanian Banking Services branches around the State.