Sofcorp Financial Services

Helping clients achieve
financial independence.

SOFCORP
Financial Services

What we do...

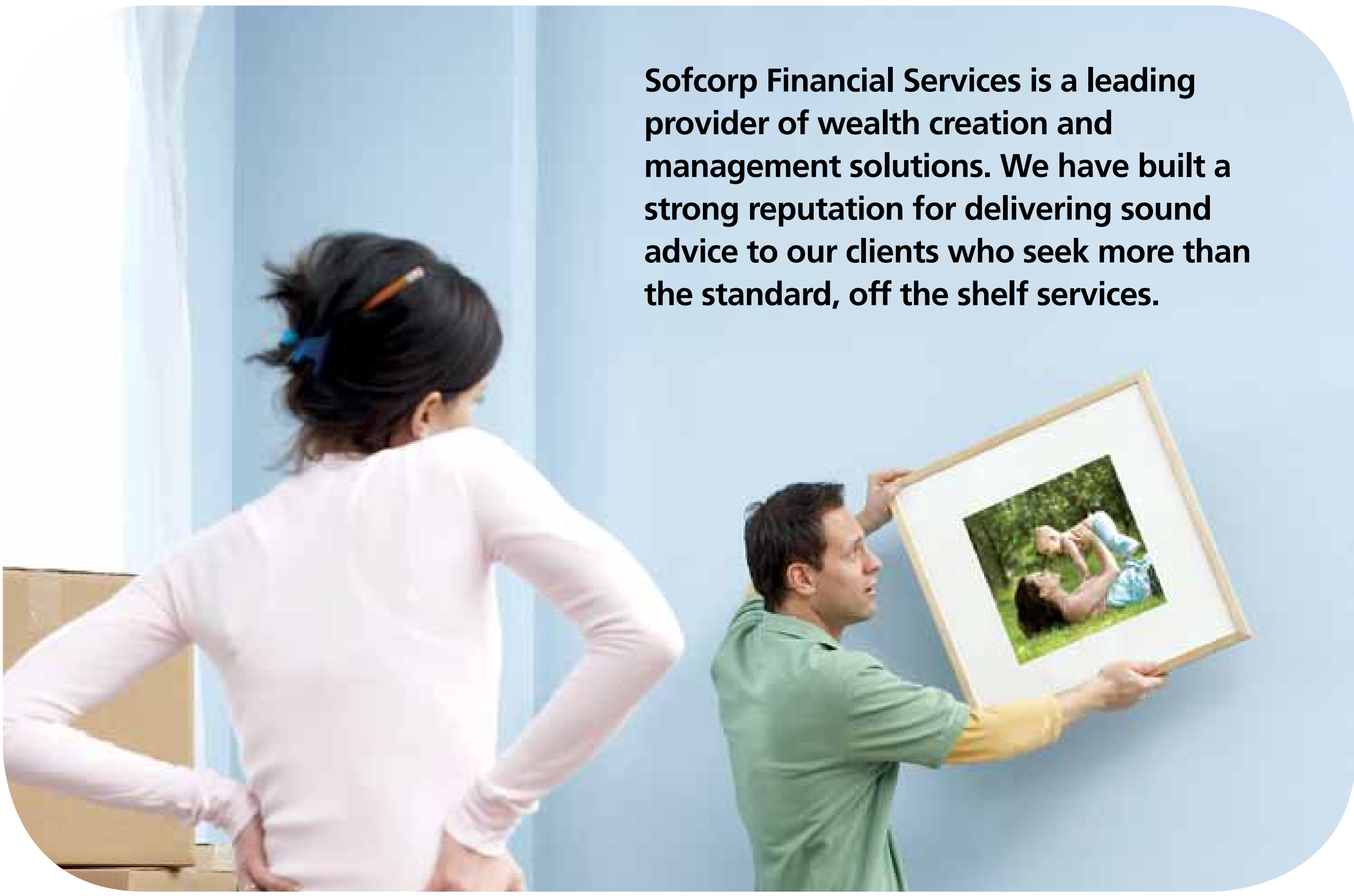
At Sofcorp Financial Services, we believe the real value of advice comes from the commitment our staff provides to each of our clients. This includes:

- **Strategic direction:**
  We help our clients to set their financial goals and develop strategies to assist in achieving them. We guide our clients through the complexities of financial planning.
- **Focus:**
  Life doesn't always offer us a smooth journey and often when we hit a bumpy road we are unprepared. At Sofcorp Financial Services, we provide clients with perspective, confidence and sometimes emotional support to help stay on course and avoid making inappropriate decisions when they are under pressure.
- **Expertise:**
  The sophistication behind a financial plan is often underestimated. We have the skill, knowledge and expertise to help clients reach their financial goals.
- **Time saving:**
  We understand your time is precious. We take care of reviewing our clients investments, lodging applications, undertaking research, compliance and handling all administration tasks on their behalf.

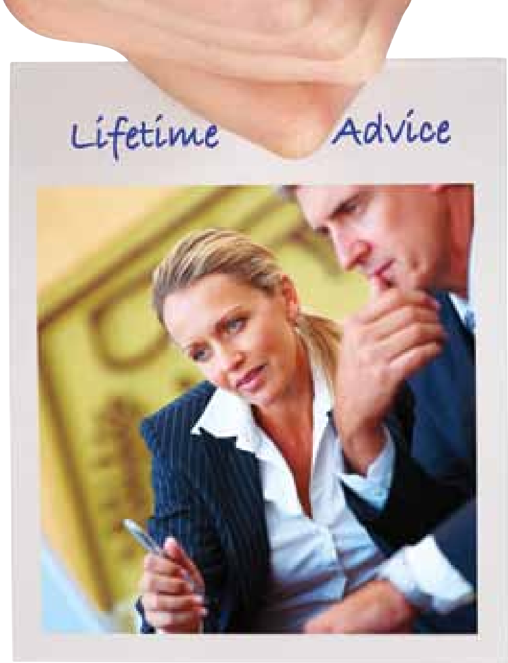
  Timing can be important. Being in the right financial position at the right time could be the difference between financial success or failure.

  We are constantly monitoring financial markets and investment opportunities for our clients.
- **Ongoing discovery and course correction:**
  Goals change, attitudes change, relationships change. Not only must a plan be monitored, but the goals and relevancy should continually be tested. We help ensure that your plan is still relevant for your future circumstances.

A Sofcorp Financial Services Adviser can help you make it happen!



Sofcorp Financial Services is a leading provider of wealth creation and management solutions. We have built a strong reputation for delivering sound advice to our clients who seek more than the standard, off the shelf services.



Our strength...

Experience

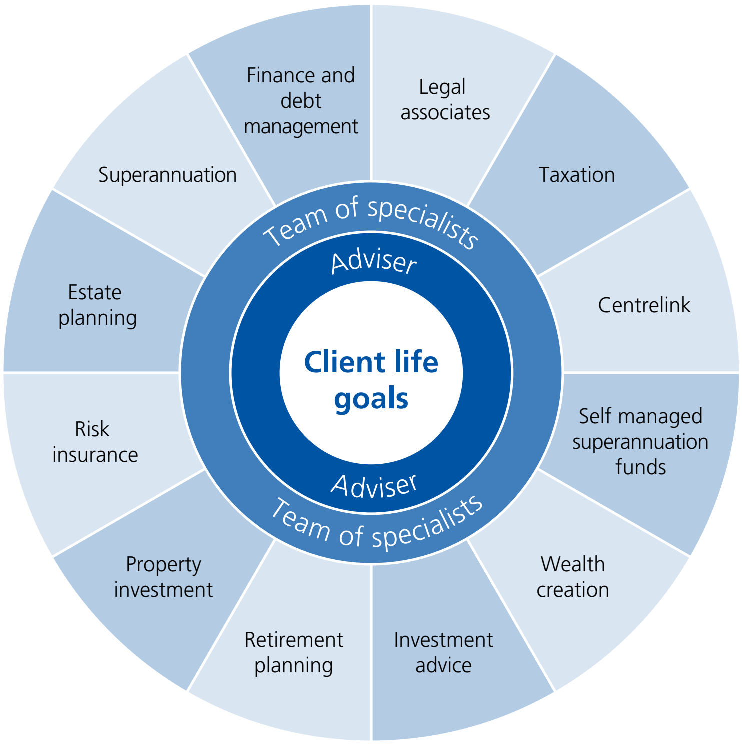
Sofcorp Financial Services is a full service financial planning business that has an extensive and loyal client base. Since 1999 we've been advising and guiding clients on their roadmaps to financial security.

Research capabilities

We undertake extensive research to choose from a myriad of investment and insurance options and products to tailor the strategic plan to suit your objectives. Our team of advisers continually analyse the latest market conditions and trends to ensure you are equipped with all the tools to make confident decisions that are based on sound information.

Comprehensive service

To help you navigate the ongoing challenges of the changing financial landscape, we offer sound and timely advice, convenience and choice to help you at every stage.



Your journey...

At Sofcorp Financial Services, we understand that one size doesn't always fit all.

The value of advice...

At Sofcorp Financial Services, we understand that each client has many options to consider when it comes to creating and managing their wealth. So to help you navigate through the complex options, we offer our clients a disciplined and objective partner who delivers advice based on an intimate understanding of their needs and objectives.

Our partnerships are built on a lifetime of advice.

Initial assessment

> Fact Find

> Risk profiling

> Establishing investment objectives

> Setting expectations

Our planning process starts with understanding you; your background, investment objectives, risk tolerance and existing investment pattern.

A comprehensive Client Profiling exercise helps us in evaluating your risk appetite and understanding your investment objectives, which are kept in mind while building your financial plan.

Strategic advice

> Extensive research

> Tailored plans

> Financial freedom

We employ advanced wealth management solutions which reflect your individual objectives.

Your financial plan will discuss a diversification strategy and identify appropriate investments, as well as look at any social security issues, risk management, and taxation planning. It will also explain in detail the benefits, features, and fees. The result is a complete financial solution – a financial 'map' documented in our detailed written report to you known as our Statement of Advice.

Proactive review

> Grow / monitor and measure

> Staying focused

We monitor and measure progress towards your goals, and ensure that our advice is robust. Our ongoing proactive review process is designed to keep us up to date with your needs including:

- Understanding changes to your personal and financial circumstances affecting your long-term plan.
- Discussion on the economic environment, and any investment and legislative changes that may impact on your strategy.
- Offering additional advice about your investment portfolio and its valuations.
- Recommending changes to your investment strategy and/or investment portfolio.

Our team of specialists...

Taking control of your finances could be one of the most important things you'll ever do for yourself and your family.

When it comes to something as personal and important as developing and achieving your financial goals, trust and commitment are what you seek.

Sofcorp Financial Services offers highly experienced and dedicated Advisers to help you realise your objectives – and they are always just a phone call away.

Terry Sofra

ACA, CPA, CFP®

Director/Senior Partner

Email terry.sofra@sofcorp.com.au

As a senior Chartered Accountant and Certified Financial Planner with over 20 years experience, Terry has the specialised ability of providing simple and logical solutions to complex tax and wealth management problems.

Terry specialises in assisting business owners to create wealth, minimise tax and protect their assets.

Terry is genuinely committed to working closely with clients to make future forward plans and provide logical direction to maximise their business opportunities.

Terry Sofra is an Authorised Representative of Consultum Financial Advisers Pty. Ltd.

Glenn Trickey

CFP®

Partner/Financial Adviser

Email glenn@sofcorp.com.au

Glenn has a diverse role as partner and business manager of the firm. Glenn provides personalised financial planning solutions and ensures all Sofcorp Financial Services clients receive tried and tested financial strategies, tailored to their individual needs.

This is achieved through an integrated system of wealth creation, wealth accumulation and wealth protection specialists working together to assist clients in all aspects of their financial needs.

Glenn is a Certified Financial Planner with over 8 years experience in the industry.

Glenn Trickey is an Authorised Representative of Consultum Financial Advisers Pty. Ltd.

Tracey Sofra

CPA, CFP®

Partner/Financial Adviser

Email tracey@sofcorp.com.au

Tracey is regarded as an experienced leader in the financial services industry, with exceptional skills and experience. She has provided trusted advice to thousands of personal clients over the past 20 years and is an acknowledged expert in the areas of tax, superannuation, and investments.

As partner, Tracey is involved in the strategic planning and management of the firm. She works extensively as a strategist and consults in all aspects of financial planning and taxation advice.

Tracey is a Certified Financial Planner and a Certified Practicing Accountant.

Tracey Sofra is an Authorised Representative of Consultum Financial Advisers Pty. Ltd.

Your conversation begins here…
Partner with a Sofcorp Financial Services adviser today.

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CFASFS0012 05/2011

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