Ellingworth, Pearce and Associates

At Ellingworth, Pearce and Associates our goal is to help our clients achieve a more prosperous future by providing them with quality advice. With professional financial planning we can grow your wealth, ensuring a more prosperous future for you and your family.

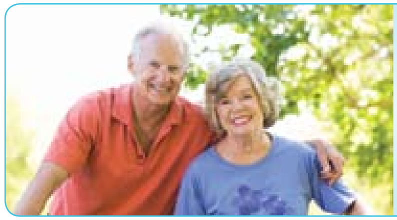
Tailored Financial Solutions

Investing successfully requires focus and commitment. At Ellingworth, Pearce and Associates, we partner with our clients to deliver successful, tailored risk and retirement financial solutions over the long-term.

We offer our clients clear insights and comprehensive tailored financial solutions to ensure their financial strategies remain consistent with changes in their circumstances, legislative updates and product enhancements.

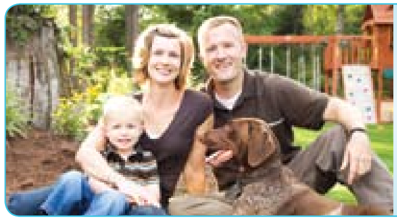
Here's what you can expect from us:

- High quality risk and investment advice;
- Intelligent, individual solutions explained in easy to understand language;
- Consistent exchange of information and open communications; and
- A focused team of talented professionals.



Retirement

- Pre-retirement Wealth Accumulation
- Retirement Income Streams
- Investment Strategies



Risk Insurance

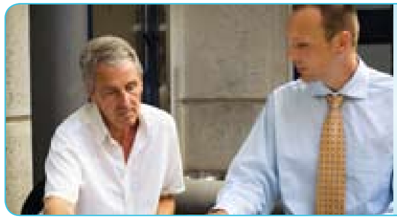
- Income Protection
- Trauma Insurance
- Life Insurance
- TPD
- Business Expenses

Business Succession

- Legal Agreements
- Insurance
- Agreed Valuation Formula

Superannuation

- Fund Review
- Consolidation Investment Selection
- Superannuation strategies



Wealth Accumulation

- Superannuation
- Investments
- Gearing

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The value of our financial advice

Client Advice

- Listen to you and discuss your needs;
- Give you confidence, security, peace of mind; and
- Strive to meet your objectives by making recommendations based on sound research

Client Operations

- Prepare and follow-up applications;
- Organise all the associated documentation required; and
- Provide detailed summaries of your file

Client Review

- To ensure your current insurance/superannuation matches your goals and objectives;
- Assess products according to your current circumstances; and
- Advise you of any legislation changes that may effect you

The initial client meeting is free of charge and without obligation. At this meeting we will discuss your options and look at some of the following strategies:

- Using time to your advantage with compound returns;
- Enabling growth and helping minimise risk through a diversified spread of investments;
- Structuring investments according to your family situation to be more tax efficient; and
- Managing assets and using them to build greater wealth.

At Ellingworth, Pearce and Associates, it's all about making the most of your insurance, superannuation and investments for today, tomorrow, always.

Contact us

Begin your financial journey today, please contact:

Ellingworth, Pearce and Associates

Level 6, 175 Collins Street
Melbourne, VIC 3000

Telephone: 03 9663 3031
Facsimile: 03 9663 3037

Hands on experience

Our clients are serviced by a focused team of talented people to provide perspective on your financial solutions.

Roger Ellingworth

M.D. Senior Financial Adviser MBus (RMIT), Dip FP, CFP
Authorised Representative

Roger has been in the Financial Planning Industry since 1983 with experience in all aspects of Financial Planning, Roger has predominantly specialised in Retirement Planning. Along with the responsibilities of the strategic direction of the practice and Management of staff, Roger's primary role is to assist clients in achieving their financial and lifestyle goals in retirement.

Daryl Pearce

Director, Risk Specialist
Authorised Representative

As a Director, Darryl is heavily involved in the strategic planning and management of the practice. After a number of years offering clients a broader range of financial planning, Darryl chose to specialise in Wealth Protection and Risk Management. Darryl has significant experience in analysing and finding solutions to Personal and Business Risk Management needs. Darryl has been providing Financial Planning services to his clients since 1990.

Samantha Hawkins

Relationship Manager, Senior Financial Adviser, Dip FP, CFP
Authorised Representative

Samantha's role as Relationship Manager is central to our relationships with our clients. For most clients, Samantha is the primary point of contact. Samantha is able to assist clients with a broad range of Financial planning needs, referring to others for their specialist advice when appropriate. Samantha has been in the Financial Planning industry since 1995 and is a Certified Financial Planner.

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