



# Helping grow, protect & maintain your wealth



# We help you clarify your goals and simplify your finances so you achieve your best life.

## The Eclipse Group

The Eclipse Group was founded by Justin Butler in 2003 after he left Westpac Bank where he'd been a Financial Planner since 1991 servicing the Mackay - Whitsunday area. The head office in Airlie Beach has now grown to include offices in Proserpine and Bowen as well as the Gold Coast.

Eclipse has four Financial Planners across our business along with dedicated support staff. We understand that in today's fast-paced consumer world, money can control our lives but finding the time and expertise to master our finances can be hard.

We offer broad-based, personalised advice covering all aspects of your finances. From the bedrock of understanding your cash flow to clarifying your life goals and setting your financial goals through to planning your retirement. We cover all the areas in between, with estate planning and personal insurance, through to debt reduction programs, superannuation and wealth building.

We are your Financial Project Manager, working closely with your Mortgage Broker, Accountant, Solicitor and Real Estate Agent, ensuring everyone is focused on the ideal outcome for you and your family. If you don't know which professionals to engage, we can refer you to specialists we've worked with previously who suit your requirements.



**Justin Butler**  
Director | Business Financial Planner



**Greg Morianos**  
Director | Senior Financial Planner



**Steve Obst**  
Senior Financial Planner



**Jake Flaherty**  
Financial Planner

## Growing your wealth

How to manage money, reduce debt, build equity and save tax.

- ✓ Retirement investments
- ✓ Home loan advice
- ✓ Shares & Managed funds
- ✓ Negative gearing & Margin Lending
- ✓ Salary packaging
- ✓ Financial Coaching & Mentoring
- ✓ Child Investment Plans

## Protecting your lifestyle

Help to ensure you and your family are protected against illness, injury or death.

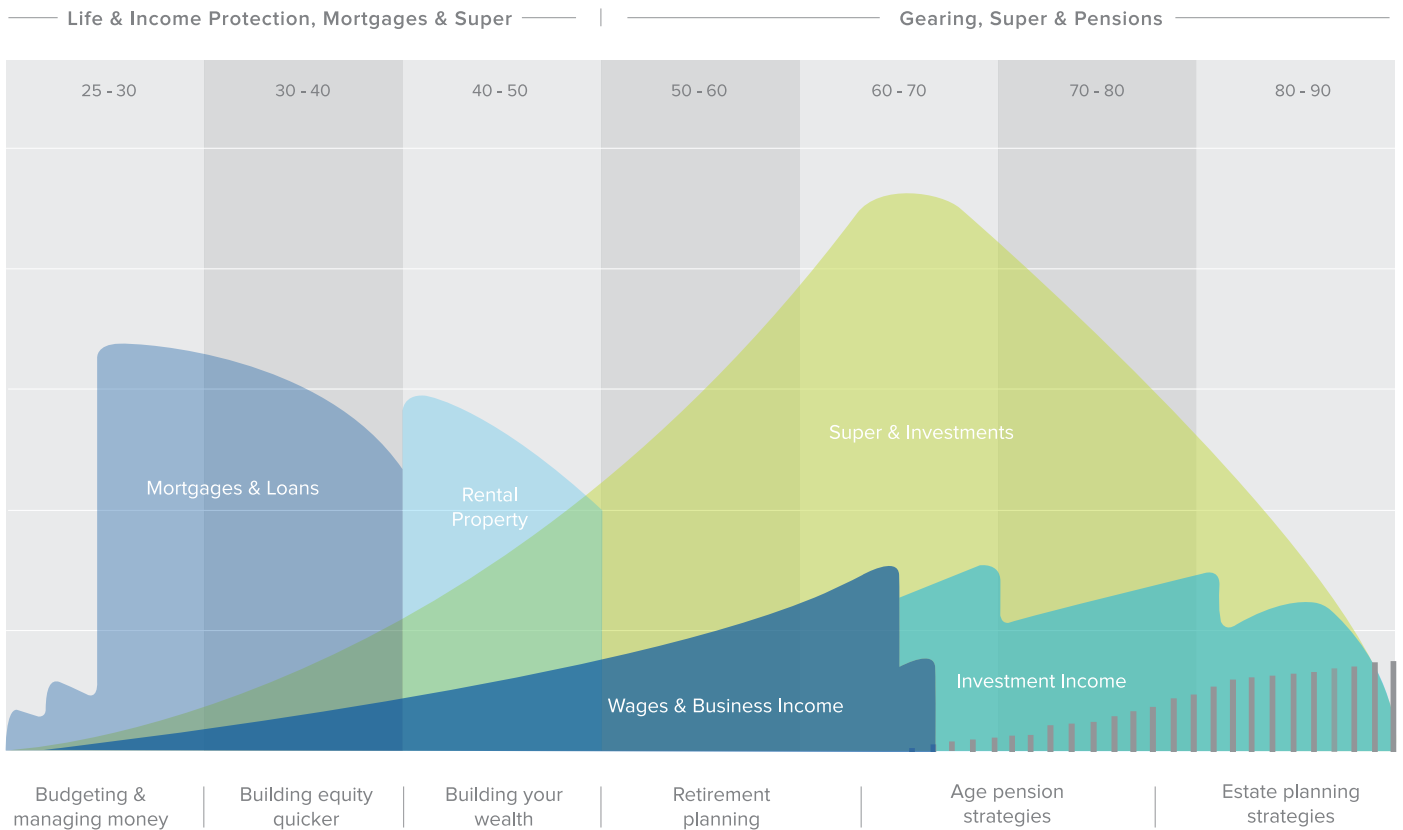
- ✓ Income Protection
- ✓ Life insurance
- ✓ Disability insurance
- ✓ Major medical trauma cover
- ✓ Wills & Powers of Attorney
- ✓ Business key person & buy sell cover

## Maintaining your wealth

Plans to shield you from downturns, make your investments last and maximise Centrelink where appropriate.

- ✓ Retirement investments & pensions
- ✓ Retirement protection strategies
- ✓ Super Pensions
- ✓ Age pension & Centrelink support
- ✓ Aged care support
- ✓ Estate planning help
- ✓ Succession plans (families & businesses)

# Guiding you through your financial life



## The Financial Planning Process



Getting to know each other is free. Bring in your financial info with you.



We scope out your goals, the strategic advice required and then quote fees.



We prepare a detailed, personalised Statement of Advice (your financial plan).



We implement the advice and keep you on track towards your goals with our ongoing service packages.

Getting to know you is at our cost, and we'll even shout the coffee. The cost of advice is always clearly explained before you decide to proceed to formal personal advice.



## Broad range of product providers

At Eclipse Financial Planning, we pride ourselves on not being aligned with any particular bank, investment or insurance companies. When the time comes for that big decision on which investment or insurance to select, this gives us the ability to recommend the best product at the lowest cost that meets your needs from a range of reputable providers.



### Airlie Beach

☎ 07 4946 7359

1 Carlo Drive  
Cannonvale  
Qld 4802

### Gold Coast

☎ 1300 857 359

Suite 8  
2 Fortune Street  
Coomera  
Qld 4209

### Bowen

☎ 07 4763 9130

58a Herbert Street  
Bowen  
Qld 4805

### Proserpine

☎ 07 4945 5349

Level 1 Federation House  
20 Chapman Street  
Proserpine  
Qld 4800

[www.eclipsefp.com.au](http://www.eclipsefp.com.au)



Eclipse Financial Planning - Whitsunday Pty Ltd, ABN 47 106 053 249 and Eclipse Financial Planning - SEQ Pty Ltd, ABN 48630167458 are Corporate Authorised Representatives (No. 422806 & 1288060) of Alliance Wealth ABN 93 161 647 007 Australian Financial Services License No 449241. Alliance Wealth Head Office, Level 13, Corporate Centre One, 2 Corporate Ct, Bundall QLD 4217