

Business Update

In 2014, Genesys Wealth Advisers completed a strategic business review which resulted in a need to rationalise with another licensee to ensure our clients continue to get the very best advice and service.

This means that Aspirations Wealth Group, as a current Genesys member firm, will now join Charter Financial Planning. This change will come into force as of 30 April 2015.

This will have no effect or impact on our client relationships or the advice we provide to our valued clients.

Thank you for your continued support and if you have any questions please contact our office.

Below is a summary of what changes and what remains the same.

What the change will mean to you!

What will stay the same:

Our Service

We pride ourselves on our quality service. Our team remains the same; our location remains the same; our commitment to you remains the same.

Our Office

Our office will still be:
25, Level 5, MacMahon St, Hurstville

Our postal address stays as:
PO Box 507 Hurstville NSW 1481

Our phone number is still:
(02) 9580 7966

Our website remains:
www.aspirationswealth.com.au

The Team

Michael Barker
Rik Arendsen
Mark Dalla-Bona
Chris Morkos
Jenny Wang
Sheri Johnston
Marie Dawes
Jo Ryan

Your Investments

These remain unchanged. Your portfolios will stay the same (unless discussed otherwise at review), with Michael and Rik remaining as your wealth advisers.

What will change:

Genesys

The Genesys name and logo will no longer appear on our business cards and our letterhead.

Charter

The Charter name will appear on our business cards and our letterhead. Charter has 343 financial planning practices across Australia, making it one of the largest financial planning networks.

Each business licensed by Charter is privately owned and locally operated. Charter provides these businesses with back-office support and processes so that Aspirations Wealth Group and its advisers, can focus on what's most important - improving the lives of their clients.

