



Professional Investment Services Pty Ltd

A.B.N. 11 074 608 558

Australian Financial Services Licence No. 234951

Want Real Financial Advice?



Noll Moriarty, CFP®

B.Sc(Hons), M.Sc(Hons), Dip.Ed

Diploma of Financial Planning

Authorised Representative No. 245078

These are some of services that I offer:

- ✓ Strategic advice that adds value in excess of costs
- ✓ Comprehensive & integrated strategies including investments and personal insurances
- ✓ Mortgage broking loans (through Australian Loan Company Ltd)
- ✓ Rigorous reality check of current financial situation
- ✓ Use of sophisticated “Efficient Frontier” investment portfolios
- ✓ Tax-efficient strategies - wealth creation & debt minimisation & retirement planning
- ✓ Regular ongoing communication with benchmarked performances
- ✓ Extensive qualifications and experience; passion for excellence

Characteristics of people suited to my approach:

- ✓ are serious about building, or already have, significant wealth
- ✓ willing to make some sacrifices today to improve future standard of living (eg retirement)
- ✓ want real advice with no bias to any specific products
- ✓ want appropriate financial education to facilitate their making informed decisions
- ✓ want pros and cons of alternative investment strategies
- ✓ want independent research supporting proposals regarding problematical areas
- ✓ want a scientific approach to underpin financial modelling and conclusions
- ✓ have a primary focus on the benefits and value-add after necessary costs of good advice

Look elsewhere for financial “advice” if you:

- ✗ have a primary focus only on costs, instead of the benefits after costs
- ✗ are sceptical that a qualified and dedicated professional could improve your wealth
- ✗ are unwilling to initially make significant time for input to a fully integrated plan
- ✗ are indecisive when presented with pros and cons for a range of choices
- ✗ accept non-individualised planning and broad-brush financial modelling
- ✗ require wholesale investments and do not wish to use Asgard master trust as the vehicle
- ✗ like to be smooth talked, instead of having frank discussions about what is realistic

My Contact Details

Phone: 07 - 3263 3568 or mobile 0409 326 335

Address: 8 Stringybark Drive, Aspley Qld 4034

Email: nmoriart@bigpond.net.au

Internet: www.nmoriarty.com.au



Clients throughout Australia and the world