GPS WEALTH

The way of the future, and not the past

YOUR MISSION BRIEF

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GPS WEALTH

Level 15, 115 Pitt Street
Sydney NSW 2000

+61 2 8074 8599

info@eastonwealth.com.au

www.gpswealth.com.au

The way of the future, and not the past

WHO IS **GPS WEALTH?**

GPS Wealth leads the way in a new category of Financial Services Licensees: described by many as the way of the future, not the past. We have one central goal: to support financial advisers on their journey to building their ideal practice, engaging and retaining their ideal clients and giving high-quality financial advice.

GPS Wealth belongs to a group of leading financial services companies under the umbrella of Easton Investments (ASX:EAS). The common goal of the group is to lead the convergence of Accounting and Wealth to maximise opportunities and resources for both the adviser and accountant.

GOALS PLANNING STRATEGY

LEADING THE CONVERGENCE OF **ACCOUNTING AND WEALTH**

GPS WEALTH THE SMSF EXPERT

merit wealth easton PantherCorp

KNOWLEDGE SHOP law central Legal Documents Online

The way of the future, and not the past

A FORMULA THAT **DRIVES SUCCESS**

GPS WEALTH

The way of the future, and not the past

GPS Wealth is a leading financial services licensee that commenced operation in February 2012. Since our inception we have won the following awards.

2014
ifa Best New Licensee

2015
ifa Dealer Group of the Year
CoreData Licensee of the Year

2016
ifa Dealer Group of the Year
CoreData Licensee of the Year

2017
CoreData Licensee of the Year

2018
CoreData Licensee of the Year

2019
ifa Dealer Group of the Year

2014 | 2015 | 2016 | 2017 | 2018 | 2019

PARTNERING WITH **GPS WEALTH**

We partner with 'advisers of the future' who are ready to pioneer proven and established processes, engagement tools and the philosophies to gain an edge in this new world of financial advice. An Adviser who is driven to break through the boring old world cycle and is looking to grow their practice with a new wave of thinking - The way of the future, and not the past.

CULTURAL FIT

GPS Wealth holds very strong values within its network of Accountants and Advisers. Advisers embrace the GPS systems, engagement processes, but most importantly, they support and lean on one another to navigate this new world of financial advice.

INSPIRE & DREAM

Dinosaurs are from the old world. We want advisers who have a vision, to dream big and be ready to work hard to get to their destination. Ready to evolve and challenge the frontiers.

PASSION

Being a pioneer of the new advice world isn't for the faint hearted. We want every adviser hungry enough to achieve growth and success. Our job is to push you to achieve your goals, grow your practice, it's revenue and provide the best advice to your clients.

PROFESSIONALISM

The badge we have, we wear with pride because we know there is substance and recognition behind it. We believe in efficiencies, but there is no tolerance for shortcuts, and there is no tolerance for unethical behaviour in the smallest areas.

OUR BELIEFS **AND VALUES**

PIONEERS OF THE NEW WORLD

We believe the adviser is the most critical part in the advice process. The systems, processes, philosophies and technology are the logistics that serve as the backbone to delivering quality advice.

It's a bold claim, but at GPS Wealth we strongly believe that just like mans mission to push the boundaries of space and pioneer the giant leaps forward - we too are pioneering and navigating the way in a new world of financial advice.

GPS Wealth serves as a support system [Ground Control] to keep advisers ship shape, on course and well equipped to handle any scenario (even if unprecedented!).

OUR MISSION

To help advisers build ideal practices, work with ideal clients, deliver great advice. We aim to achieve excellence in everything we do.

OUR PURPOSE

To adhere to a high standard of business ethics and place our clients' needs as our most important priority, through delivering a high quality of financial advice to people throughout Australia.

DEVELOPED BY SUCCESSFUL ADVISERS FOR SUCCESSFUL ADVISERS

GPS WEALTH

The way of the future, and not the past

NAVIGATING

THE NEW WORLD OF FINANCIAL ADVICE

EXPERT MENTORING

We aren't prepared to take any risks on this mission. Our team will mentor you to handle any challenge you meet and grow your practice at the same time. We push you like a personal trainer to meet your business goals.

SYSTEMS AND PROCESSES

We understand you are already an accredited adviser. But we also understand being on the frontline doesn't always give you a 360 view. Our purpose is to support you, identify possible hazards and engage where necessary in fixing them. The ultimate wingman.

ENGAGEMENT EXPERTS

We have the formula for quality advice. In fact we pride ourselves as engagement specialists. We have the processes to get you on the front foot, and the tools to accomplish the job at hand. Throw away that hammer! Your a professional, It's time to adopt a nail gun.

CHARTING YOUR **DESTINATION**

BUILDING A GREAT TEAM

Your a highly skilled adviser, you have partnered with a leading licensee. But just like every captain, you need an amazing well balanced crew that understands the journey we are all on. We help you structure your team to maximise the efficiencies of the back office. Use the power of personality profiling to understand your teams strengths and weaknesses. Assign the right jobs to the right people so you can "fly the ship" and know everything else is taken care of.

PROFESSIONAL SUPPORT

We have a team of experts in every field waiting to assist you. An Investment Committee constantly providing insights on the world economic scene. Quality Advice Specialists to help you fine tune your SoA's and advice. CPD Specialists to help keep you on track of your FASEA requirements. Technology specialists to help you master your advice systems and platforms, and gain efficiencies in your advice process.

GPS WEALTH

THE GPS WEALTH **SYSTEM**

First Orbit
(Communications Array)

Second Orbit
(Services Array)

BUSINESS DEVELOPMENT & COACHING

Business Planning and Strategies for growth,
Business Reviews, Boards of Advice
Referral Partner arrangements

CLIENT ENGAGEMENT

Game of Money Philosophy

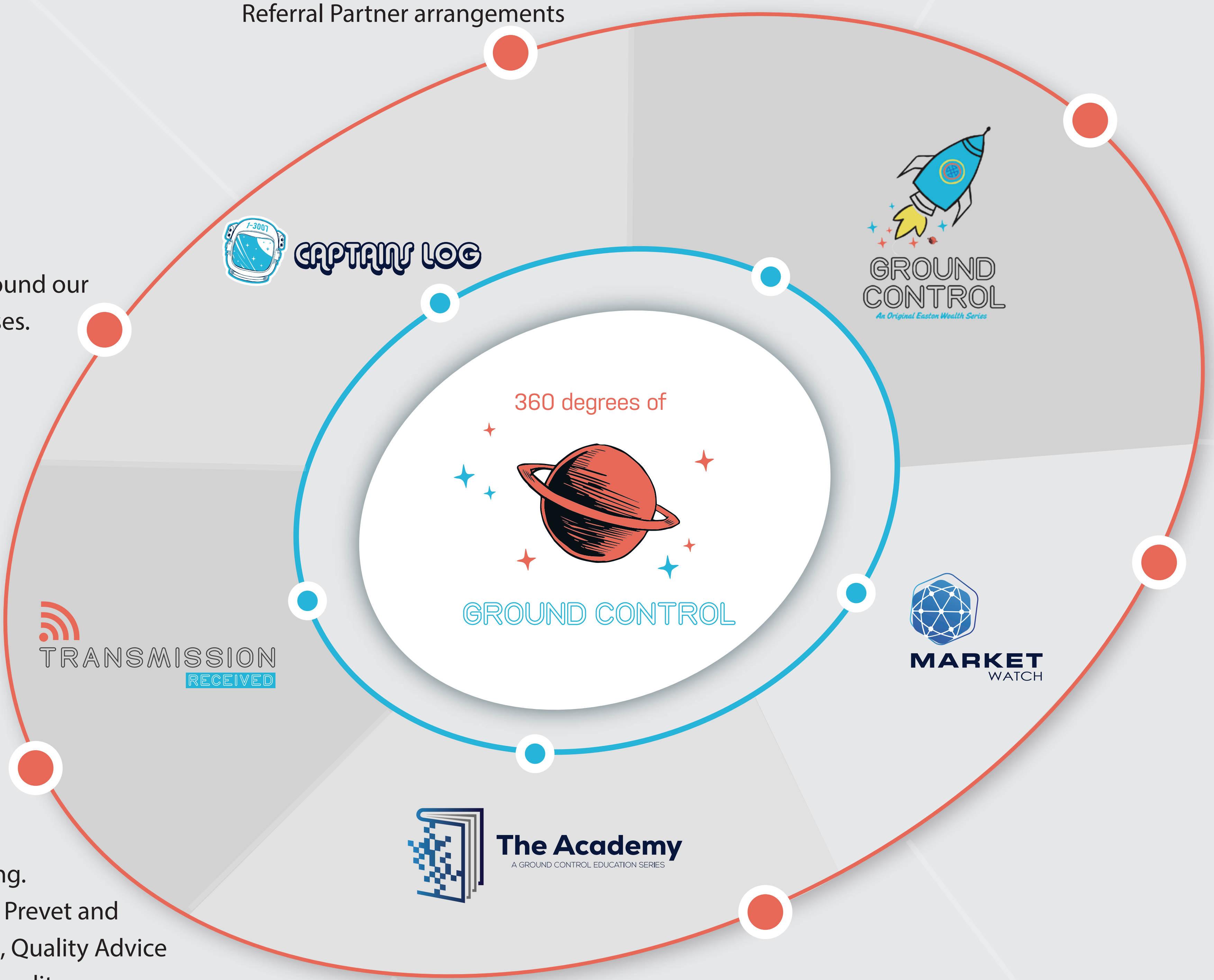
- PERFECT Foundations
- Pathway to Wealth
- Countdown to Retirement
- Retire in Style

Ground Control Multimedia Channels

- The Academy for Clients
- Original Ground Control for Clients
- Market Watch for Clients

TECHNOLOGY

Engagement tools built around our client engagement processes.



CARE INVESTMENT & RESEARCH

Access to CARE Investment Committee Research, Extensive APL, CARE Investment Philosophy, CARE Engagement Process, Online CARE portfolio Construction Tool.

QUALITY ADVICE

Extensive coaching and auditing.
Access to Fourth Line Audting, Prevet and Post Vet, Quality Advice Events, Quality Advice webinars, Automated website audits.

TRAINING EVENTS & ACADEMY

Professional Development Days, Virtual Webinars
Online CPD Academy Training, Leadership Days,
Annual Conference and Induction Events.

ADVISER PORTAL

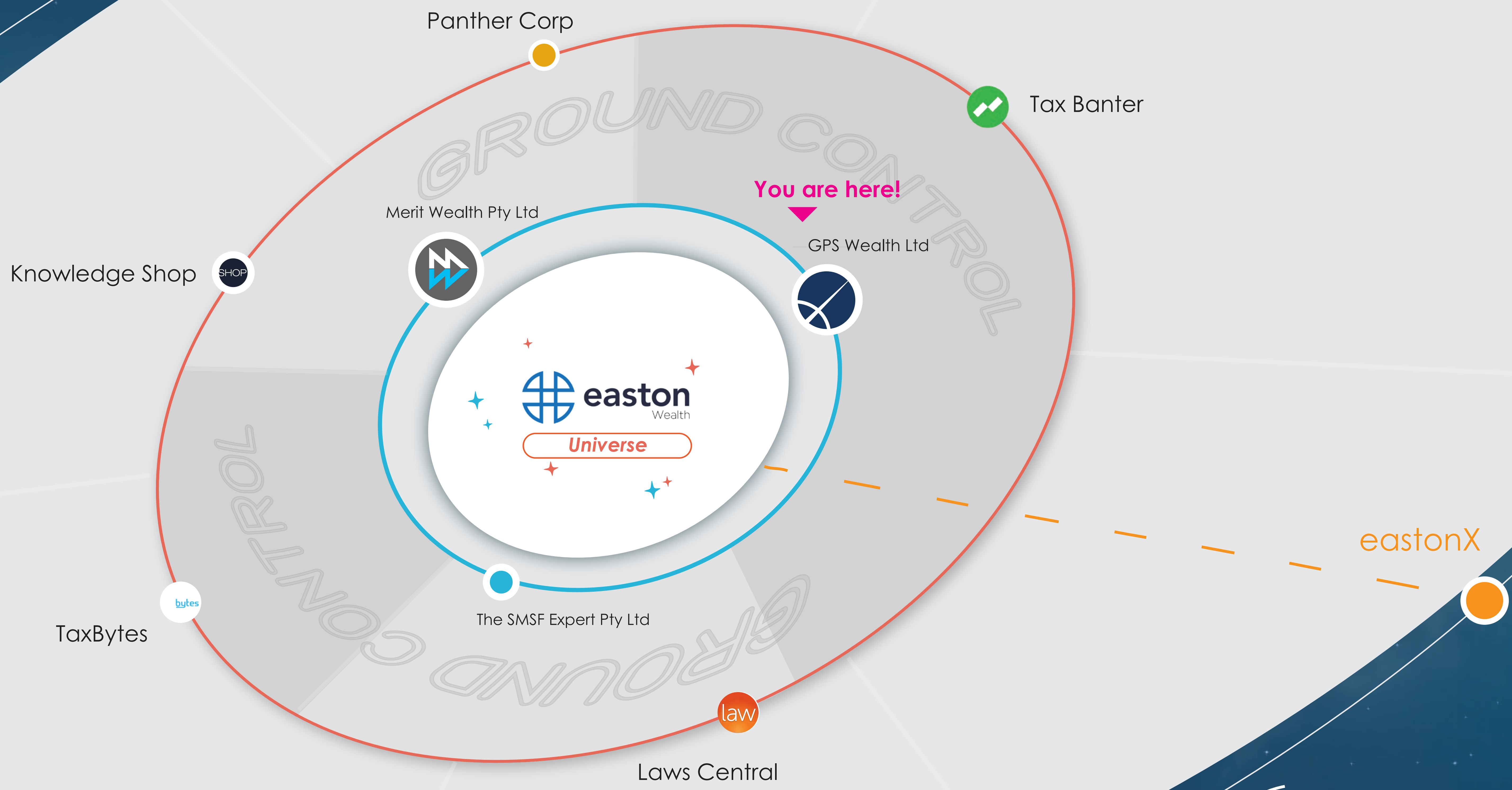
GPS WEALTH

THE EASTON WEALTH **UNIVERSE**

Ground Control Orbit
(Ground Control Array)

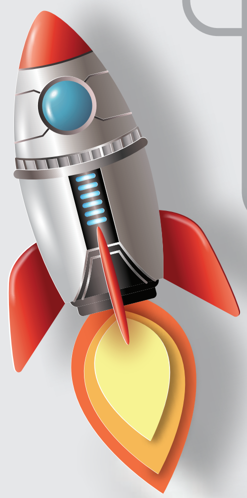
Partners Orbit
(Supporting Neighbors Array)

EastonX
(Self Licensing Pioneers)



ADVISER PORTAL

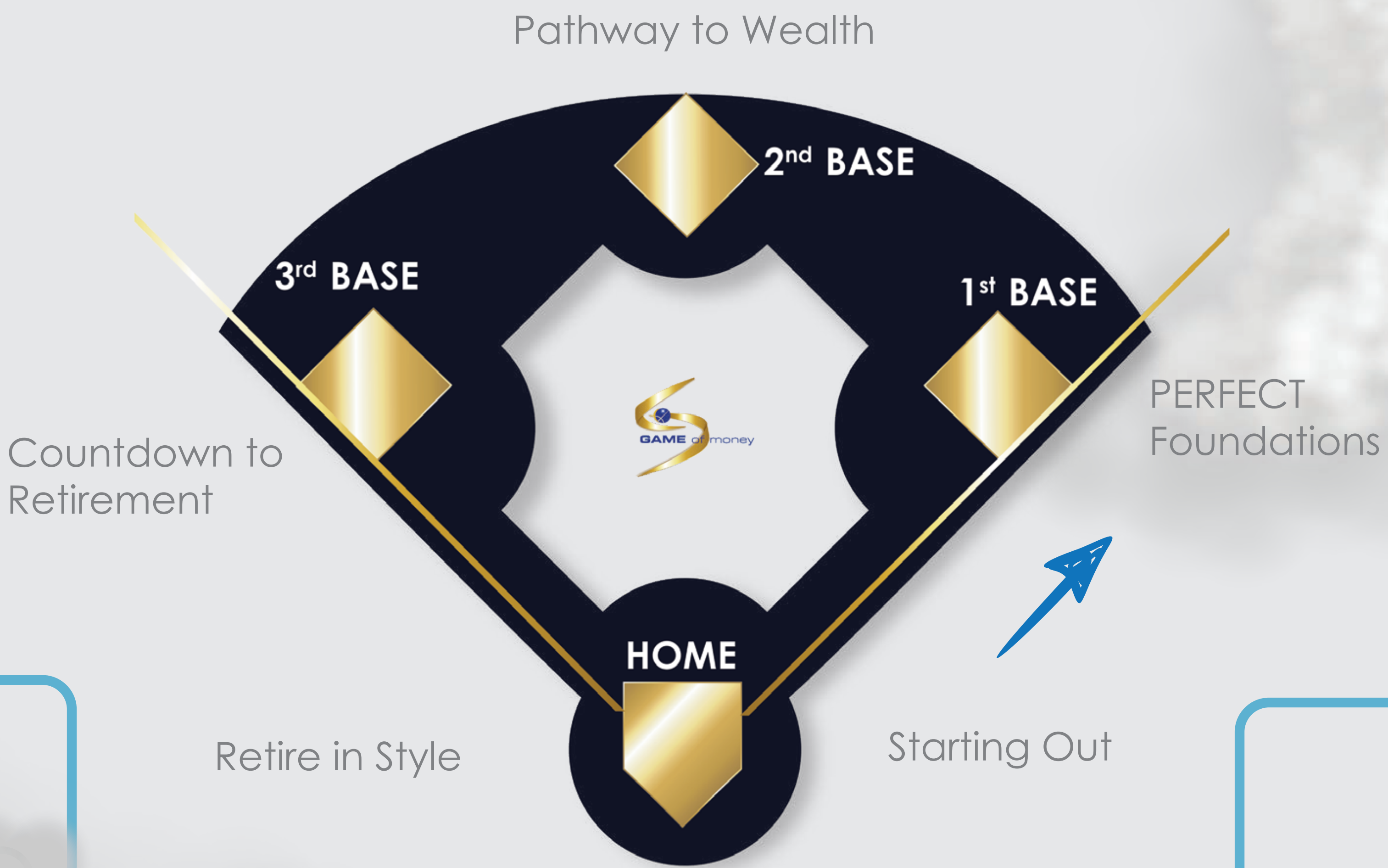
THE **GAME OF MONEY®**



We use the Game of Money® to help describe the different stages of a person's financial life. The Game of Money® was created as a communication tool to help simplify the financial journey using the four bases of a baseball diamond for a reflection of the various stages within the financial journey.

Where are you in the Game of Money?

LAUNCH YOUR CLIENT ENGAGEMENT



Easy to follow

Goals based

Client Centric

THE CAREphilosophy®

The CARE Investment Philosophy believes that 50% of your returns are made up by your investment behaviour. 45% of your return is to do with asset allocation and the remaining 5% is timing and selection.

The traditional investor would contest this and say the investor return equation is 90% asset allocation and 10% timing and selection and has nothing to do with investor behaviour.

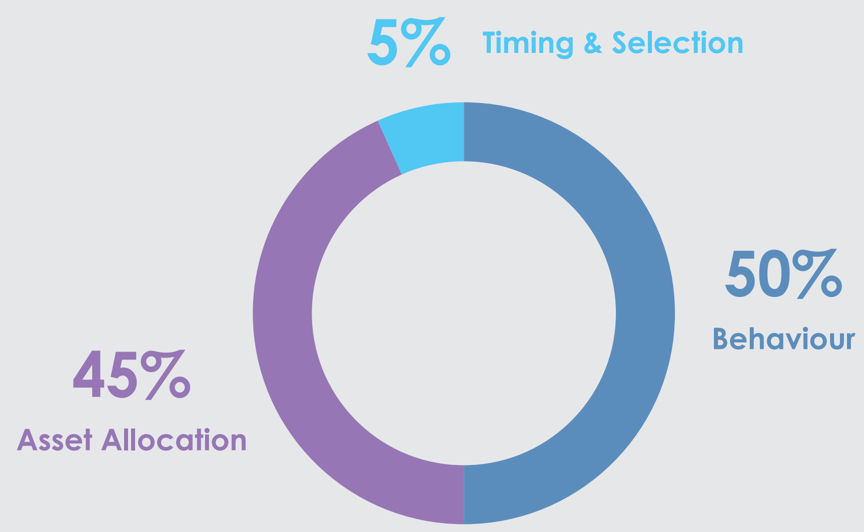
However, based upon the DALBAR Study we do know that 50% of returns are based on investor behaviour, which has a critical impact on your returns. See the impact of investor behaviour in the graph pictured.

Licensee Managed Account Finalist

2020 IMAP MANAGED ACCOUNT AWARDS

The original DALBAR Study was conducted between 1980 to 2000 in the USA on the top 500 US listed companies. The study found that the average return over that 20 year time period for the 500 companies was a 12% return.

Do you know what the return was for investors over the same period? It was around 4% over the same 20 year period! That's a poor average investor return. The number one reason for the 8% difference was bad investor behaviour.



CAREphilosophy®

ADVISER ENGAGED | CLIENT FOCUSED

C

'Core' Portfolio

Strategic Allocation

A

'Active' Portfolio

Tactical Allocation
and Downside Protection

R

'Reserves' Portfolio

Personalised and
Liquidity Bucket

E

'Enhanced' Portfolio

Alpha

Focus on achieving risk adjusted returns for clients over the long term in a cost effective way.

THE **GROUND CONTROL PLATFORM**

GROUND CONTROL

An Original Easton Wealth Series

Ground Control is a communications initiative to support the financial adviser and client, keeping them informed on the many changes happening in todays financial advice landscape. It's all too easy to be left behind or miss the important changes that impact the quality of the advice received and given, or even maintain an upper hand on advice strategies that create value to your growing practice.

Ground Control operates on five different channels to provide a 360 degree view for you. Stay on the edge of tomorrow while protecting the hard earned progress that you have already made.

Listen on Apple Podcasts

Listen on Spotify Podcasts

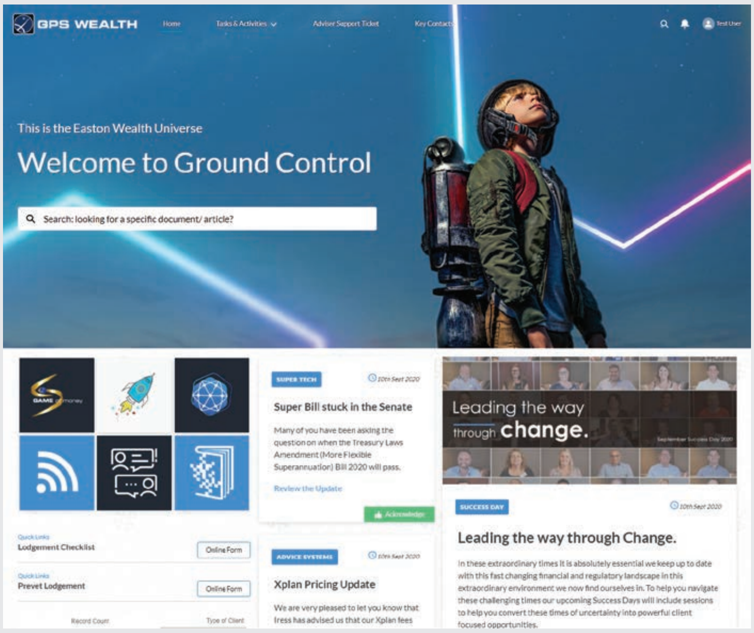
EMBED ON WEBSITE!

Very good, I like this Q&A format.

Great stuff guys! Well done & thank you for your support.

Brilliant guys - well done and thanks..

GROUND CONTROL DO YOU HEAR ME?



ADVISER PORTAL

The Adviser Portal is built on the Salesforce Infrastructure giving you a strong sturdy framework to send and receive communications between your Licensee and your-self.

Communication is critical to achieving mission success!

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LAUNCH PREP TEAM

THE NEW WORLD OF

FINANCIAL ADVICE

GPS WEALTH

Chris Monico
P. +61 476 809 039
E. cmonico@eastonwealth.com.au

Jordie Hills
P. +61 425 166 586
E. jhills@eastonwealth.com.au

Michael Smith
P. +61 457 503 494
E. msmith@eastonwealth.com.au

Adam Rogers
P. +61 400 055 371
E. arogers@eastonwealth.com.au

GPS WEALTH

Level 15, 115 Pitt Street
Sydney NSW 2000

+61 2 8074 8599

info@eastonwealth.com.au

www.gpswealth.com.au

AFSL 254 544 | ABN 17 005 482 726