Barchester Financial Services Pty Ltd
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Investment Options

In preparing our advice, we have carefully considered your personal circumstances as outlined in the personal details section of the Statement of Advice ("SOA"). We have discussed with you and decided upon a risk profile and are now looking to make recommendations as to the investments you should place your risk capital in.

In doing so, we have reviewed a range of investment options that are available to you and which may suit your situation and objectives. To better understand what each of these are, you can view comprehensive descriptions of these options provided by the Commonwealth Government's Australian Securities and Investments Commission's (ASIC) "MoneySmart" website linked here:

- Shares
- Exchange Traded Funds (ETFs)
- Property
- Managed funds

Follow the links to understand each investment option.

Our role

Your adviser will, within the parameters of your risk profile, diversify your investments across these market sectors, and within them. That is, within the Shares (also known as equities) market we will look to invest into different subsectors like Banking, Insurance, Mining and retail.

This diversification reduces risk within your portfolio.

Care: Shares are a growth assets and they will have market volatility, it is for this reason we expect you will invest for the long term – 10 years or more.