

Introduction

TAURUS offers a comprehensive range of financial and professional services to meet the needs of our clients and their families. We aim to provide a service to address all the financial and professional needs of our clients, within one organisation.

Our Objectives

- To provide a comprehensive range of Financial and Professional services.
- To provide unparalleled levels of services and personal attention to the needs of our clients.
- To provide a complete, cost effective, advisory service.
- To establish long term relationships with our clients.

Why Use Our Services?

TAURUS can assist you to address and find solutions to these important questions:

- Do you have a Vision and Financial Plan for the future?
- Do you have an active Investment Program, irrespective of size or value?
- Are you maximising your current Superannuation opportunities?
- Do you have adequate Risk Insurance to provide for debt repayment and family security in the event of illness, accident or death?
- Do you have an appropriate Home/Investment Loan solution?
- Do you have an appropriate Retirement Planning strategy?
- Do you have a current Will and Power of Attorney?
- Do you require professional advice from a Registered Tax Agent or Registered Migration Agent?

How Do You Engage Our Services?

Attend a 1 hour, free introductory meeting. At this meeting, our services, products and fees will be explained and disclosed to you.



TAURUS

CONTACT DETAILS

www.taurusfinancial.com.au

info@taurusfinancial.com.au



TAURUS

HEAD OFFICE

SYDNEY

Level 6, 2 Help Street (PO Box 1441)
CHATSWOOD NSW 2067 AUSTRALIA
Tel: +61 2 9411 4161 Fax: +61 2 9412 1518

REPRESENTATIVE OFFICES

ADELAIDE

25 Peel Street
ADELAIDE SA 5000 AUSTRALIA
Tel: +61 8 8110 0964 Fax: +61 8 8110 0900

BRISBANE

56 Wallaby Drive (PO Box 31)
MUDGEERABA QLD 4213 AUSTRALIA
Tel: +61 7 5569 2499 Fax: +61 7 5569 0888

MELBOURNE

205 William Street
MELBOURNE VIC 3000 AUSTRALIA
Tel: +61 3 9225 6824 Fax: +61 3 9225 6518

The Complete Financial Solution

TAURUS Financial Services

Investment Opportunities

Access to Banking Facilities, Local and International Equities (Shares), Managed Funds (Unit Trusts) and Property Investments tailored to your risk profile and requirements.

Superannuation/Retirement Planning

Establishment, Rollover and Review of Personal, Self Managed and Company Superannuation Funds, providing increased flexibility and control.

Provision of Allocated Pensions ensuring tax effective strategies for your retirement.

Risk Insurance

As Life Broker Representatives acting for our client, we are able to recommend a range of competitive insurance companies and their products providing Life, Trauma, Disability and Income Protection Cover.

Important Notice

Advice in respect of Investments, Superannuation and Risk Insurance is provided by your Financial Adviser through the offices of their Licensed Dealer in Securities.

Your Financial Adviser is an Authorised Representative and Life Broker Representative of Professional Investment Services Pty Ltd. Professional Investment Services is responsible for any advice regarding Investments, Life Insurance and/or dealing in Securities, provided by your Adviser to you. Professional Investment Services is a Licensed Dealer in Securities, Registered Life Broker and a Principal member of the Financial Planning Association of Australia. In this relationship, Taurus Financial Services ("Taurus") is the name of the entity that employs your Financial Adviser and Life Broker Representative.



Professional Investment Services Pty Ltd

ABN 11 074 608 558

HEAD OFFICE: L16, CORPORATE CENTRE ONE
CNR BUNDALL ROAD & SLATYER AVENUE,
BUNDALL QLD 4217

TAURUS Mortgage Services Pty Ltd

If you are purchasing a property, refinancing your existing mortgage or wish to use the equity in your property to establish an investment portfolio, **TAURUS** provides the complete solution.

Home/Investment Loans

Accredited with 25 lending institutions (including the major Banks), **TAURUS** will assist you to procure the most appropriate Loan facility, at competitive interest rates, including:

- Calculating your borrowing capacity, deposit and cost requirements.
- Ascertaining your personal loan requirements and structuring of the appropriate facility.
- Selecting the most suitable lending institution and mortgage product.
- Making application to the lending institution for approval of a facility.
- Monitoring the process through to settlement, liaising with the lending institution and solicitors.
- Processing First Home Owner Grant and Foreign Investment Review Board applications.

Legal Services

Our in-house Legal Department will:

- Review your Contract of Sale.
- Arrange Pest and Building Inspections, where requested.
- Act as your Legal Representative and attend to settlement of the property.

Important Notice

Taurus Mortgage Services Pty Ltd is a member of the Mortgage Industry Association of Australia (MIAA).

TAURUS Professional Services Pty Ltd

TAURUS employs experienced, highly skilled professionals including a Barrister at Law, Solicitor and Accountant with specialist knowledge in Taxation, Estate Planning and Migration Law.

Taxation

- Specialist Tax advice (including advice on International Structuring and Offshore Trusts).
- Business Structures (including formation of Companies and Trusts).
- Review of Employment Contracts.
- Tax Effective Salary Packaging (including Relocation Expenses, Motor Vehicle and Superannuation).
- Personal Tax Returns.

Estate Planning

- Wills and Testamentary Trusts.
- Powers of Attorneys.
- Family Trusts.
- Family and Business Succession Planning.

Migration Consulting

- Relocation and Migration Advice.
- Onshore Visa Applications.
- Migration Compliance.
- Migration Tribunal Appeals.
- Citizenship Applications.

Important Notice

Taurus Professional Services Pty Ltd is a Registered Tax Agent No. 73646000 and employs Solomon Gerber, a Registered Migration Agent No. 9905524.