

THE INVESTMENT MAXIMISER

Many people avoid taking control of their investments because they don't have time, find it too daunting, have had a bad experience or may simply not know where to start. But the sooner you take charge, the sooner you can secure your financial future.

And, we're here to help. At My Financial Mentors, we strive to deliver clarity, insight and partnership to our clients throughout the entire investment process.

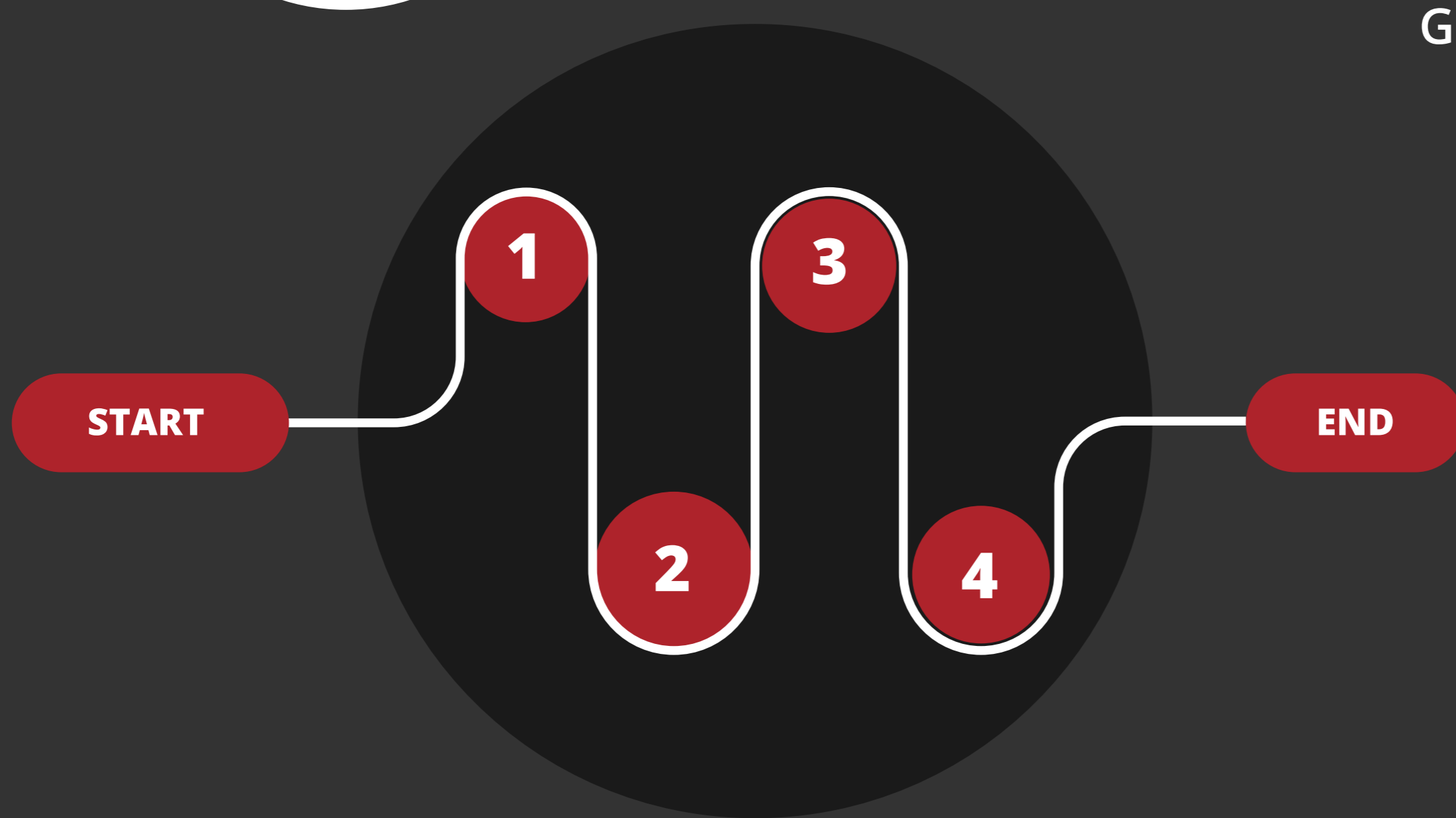
We do this by helping you to understand the investment process and working with you to create a portfolio that is right for you. There are three stages:

1

Firstly, we discuss your investment motivations as well as any hesitations or concerns you may have.

Gain Understanding of...

- Risk
- Our process & philosophy



2

Secondly, we'll talk about what your investments need to return and how much risk you're willing to take.

Everyone is different, so we need to understand what motivates you and what you want to achieve. We'll also discuss what sorts of investments align with your required outcomes, so we can tailor your portfolio accordingly. Importantly, we believe in protecting downside risk so we'll always structure portfolios accordingly.

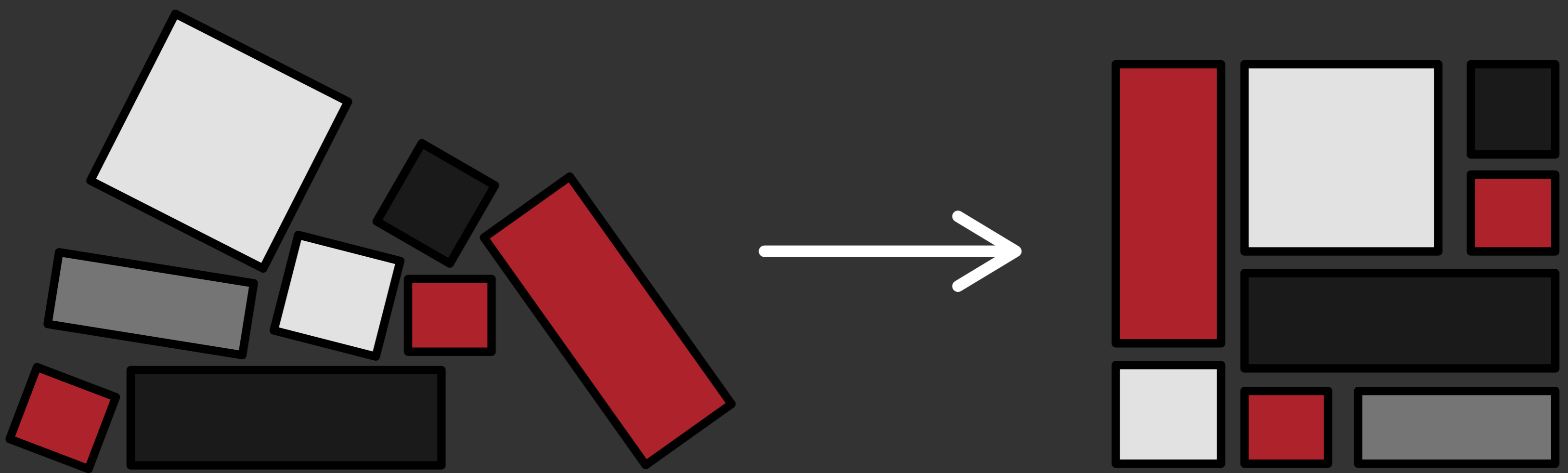
Return vs Risk Discovery

- Risk Tolerance
- Risk Capacity
- Risk Requirement
- Investment Alignment



3

Thirdly, we'll create the correct investment mix of assets and funds for you. We call this the Bordeaux Process, as just like a winemaker, it's about carefully balancing many different aspects to create the perfect blend.



A tailored investment strategy together with disciplined implementation will allow both capital growth and income generation over time, allowing you to lead the life that you want.

