Our Points of Difference

Choosing a Financial Planner isn't easy. People say ….. *"What makes you different from the rest?"* We think it's our philosophy. We see Rouleston Financial Services as providing a boutique alternative to the very large firms, with their complex cost structures and their lack of personalised service.

So, what are our points of difference and why should you choose us over other firms? Here are the reasons why you should be pleased to select us as a Financial Planner and what benefits you will gain by choosing us.

FEATURES	BENEFITS TO YOU
We believe that everyone deserves advice.	Sadly, many of our competitors won't deal with you if you don't have a large sum of money to invest. We recognise the need to provide good financial coaching to help you build wealth for your future. Regardless of your wealth, we are happy to help you.
We have been in business since May 1982.	We are experienced and are here for the long term. We consider our relationship with you to be life-long.
You deal with the Principals of the business.	This means that you deal with people who are committed to being around for you now, and into the future, unlike employees of larger institutions.
Our reputation is based on our philosophy of providing a personalised, friendly and prompt delivery of a total solutions package at a reasonable cost.	You *always* get the attention that you deserve, without a complex and expensive cost structure.
We are financial coaches and we don't just deal with money.	We instigate a structured program to help you become disciplined and focussed on achieving both your financial **and** lifestyle goals. Emotional and stressful events such as divorce, death in the family, redundancy or retirement, can force you into making rash decisions. That's where we can add value by caring and helping you deal with issues properly.
We are one of the few financial planning organisations in Tasmania who do not have our own in-house investment/superannuation products and we therefore don't have any preferences towards any insurance group, fund manager or banking institution.	You will *always* receive fair and professional advice from us that you can feel confident in.
We structure and tailor strategies and portfolios to your individual needs.	Our strategies are designed for your personal situation. They are not risky and we do not recommend anything for you that we wouldn't use ourselves.
Unlike larger firms, we don't have a 'set and forget' policy.	We have a formal review program to manage, grow and protect your wealth by continually revisiting your plan to ensure that we accommodate changes to your circumstances in the most appropriate manner. This ensures that you keep on track to meet your goals.
We help people achieve their lifestyle objectives through a disciplined investment approach.	You have a framework to achieve your objectives and make future decisions.
We believe that we are the only Tasmanian organisation to have built its practice around a process which aims to develop a lifestyle, goal focussed experience.	We help you to focus on achieving the lifestyle of your dreams.
Our existing clients refer 90% of the people we see.	Our clients have confidence in our advice and in us doing things right by them.

Our advisers are fully qualified with industry recognised qualifications.	You are dealing with professional people who will provide you with the correct information you need to allow you to make fully informed decisions about your needs, goals and objectives.
Our fees are transparent and are always documented in writing.	You know exactly how we will be charging you.
We don't charge commissions, unless requested by you.	We choose to select investment facilities that pay us a fee rather than a commission so that there are no hidden charges and you know exactly what we are charging you.
We don't simply just sell investment products.	Investments are a commodity. They're something you can get anywhere. Therefore, while it is important, selecting investment products is not our major priority. We're here to help you get financially well-organised. Our primary focus is on devising overall strategies that are designed to satisfy your needs and objectives, and maintaining a quality relationship with you.