

Our commitment to you

We'll provide you:

Security

Fenwicke Financial is wholly owned by Jim Fenwicke and operated by Jim and his team from their North Sydney office. We make our own commercial decisions and have chosen to partner with Financial Wisdom Limited who holds an Australian Financial Services Licence. We work as a team to support you, and the strength and backing of our licensee enables us to provide you with security, support and peace of mind.

Financial Wisdom is a part of the Commonwealth Bank of Australia Group, one of the Australia's leading financial services organisations. This means we are backed by security, strength and infrastructure at all times.

Control

If we cannot demonstrate our value by giving you the knowledge you need to make informed decisions that put you in control of your finances, then we believe we shouldn't take you on as a client.

Financial Wisdom's scale and vast resources equip us with all the information we need to provide outstanding service to our clients.

Tailored advice

Our access to technical specialists and a broad range of researched products allows us to provide you with a tailored strategy. We always recommend what is appropriate for you and your life and at no time are we required to recommend particular products.

Financial Wisdom's combined panel of internal and external experts have access to superior research and market intelligence, which ensures that suitable solutions are delivered every time.

Outstanding service

We want you to live the life you love, so we will always put your interests first. We promise to take the time to get to know you, and be there to guide you and help you make great financial decisions.

Financial Wisdom supports us with experienced, capable and dedicated specialists using client focused advice strategies and systems.

Professional standards

We are committed to continuous self-improvement and learning and will only ever provide advice in areas where we are qualified to do so. Our business operates in a highly regulated environment and we welcome regular Financial Wisdom audits to demonstrate the due care we give to our clients.

Financial Wisdom is committed to outstanding ongoing capability development. They take a leadership position and set high quality adviser training and performance benchmarks. They undertake rigorous reviews and monitoring to ensure we are delivering the best possible solutions.

Value

We will disclose all fees and other forms of remuneration so that they are easy to understand. We are confident that our fees are fair and appropriate relative to the lifetime value we can demonstrate. They also provide the foundation to run a sustainable business, which enables us to continue offering innovative solutions to you and your family into the future.
