



What sets JFP apart?

Our philosophy

Jensen Financial Planning (JFP) was formed with one goal in mind – to achieve our clients' financial and lifestyle objectives. We believe your interests should be reflected in your financial plan, and we use this understanding to tailor solutions to your needs in the areas of:

- superannuation
- tax effective investment strategies
- life insurance
- estate planning
- lifestyle planning.

Our people and clients are our greatest asset, and all our staff are committed to working with you to realise your financial goals. The strong relationship we forge with each client is the key to creating successful financial strategies, and is built on trust, integrity and transparency.

Quality services

We balance professionalism with a desire to be at the forefront of our field. Our personable approach includes regular review meetings to ensure you are kept up to date with the latest information and initiatives and technology. To maintain high levels of quality and service, our processes and standards are reviewed on a monthly basis.

Fees you understand

At JFP, we believe investment fees should be transparent and charged on a fair and equitable basis. We do not believe in hidden commissions for any investment advice or products provided.

All fees are provided in writing and discussed before you agree to implement our advice.

Our fees are competitively priced to reflect the time and technical expertise required to achieve an optimum outcome for you.

Local understanding – global strength

The quality and experience of our team places JFP among the foremost planning practices in Melbourne. This enables us to deliver innovative solutions to personal and corporate clients throughout Australia.

Our licensed arrangement through Aon means we are backed by the resources of a global Fortune 500 company, which is not owned by a bank or insurance company. As a corporate representative of Aon Wealth Management Ltd (no 253416), our JFP team are authorised to provide financial and life insurance product advice on behalf of AWM.

Award winning

- 2009 Gold Investment Adviser - Aon National Awards
- 2008 Achieved Top 10 Adviser position within the Aon national 270 adviser group.
- 2007 Gold Investment Planning Award at the National Aon Adviser Awards.
- 2006 Nomination in the FPA Value of Advice Awards.

Profile

Jensen Financial Planning was founded by Chris Jensen in 1992, and currently manages more than \$180million on behalf of over 300 corporate and personal clients.

The JFP team have consistently grown the practice since its inception, building long-term relationships with existing and new clients, and instilling a strong work ethic and commitment to client service. This dedication to our philosophy and service ensures our clients reliably achieve their lifestyle objectives over time.

Aon Wealth Management Ltd,
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What our clients say

"JFP helped me realise that by only worrying about returns, I was approaching the problem from the wrong direction. Now I have a retirement strategy rather than just an investment. So far I am ahead of target and feeling much more in control."

G. Robinson (Risk Consultant/Economist)

"'Thank you' for saving me from myself. Your advice and support over the past few months of the GFC have been terrific and are very much appreciated. Your commitment and strength of knowledge saved me from making a disastrous decision a few months ago and I want to acknowledge this. I move forward with more confidence knowing that I have your support and advice to help me make the best financial decisions that I can."

K. Mackin, (General Manager, Coremetrics)

"I have been working with Chris's team and Aon for many years."

"During a change in employment JFP was extremely helpful in updating and continuing my life Insurance arrangements."

"They ensured I maintained quality and appropriate cover at competitive rates."

"They also made arrangements for my superannuation to continue under my own personal plan while receiving employer contributions."

"Knowing the job was being handled professionally and efficiently gave me peace of mind."

**R. McPherson
(Chief Financial Officer -
Patrys Limited)**

"I have been dealing with Chris and the team at JFP for over 7 years and continue to receive a personalised service."

"They provide me with regular reports and updates, as well as quality comprehensive advice on various matters other than superannuation and investing, such as estate planning and life insurance needs."

**J. Davis (President, Sanford Brands,
Asia Pacific and Africa)**

"Though tough in the early years, JFP advised me to stick to our plan with a longer-term objective. This has paid handsomely. I am well within my retirement objectives."

**M. Collis
(ex-Newell Rubbermaid,
Vice President Finance)**

"The JFP team have been terrific and covered all aspects which are important to us. They have had a clear understanding of our goals and objectives throughout the planning process. My wife and I are very pleased."

M. Healy (Retired General Manager, Win TV)



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