



INVESTMENT PHILOSOPHY



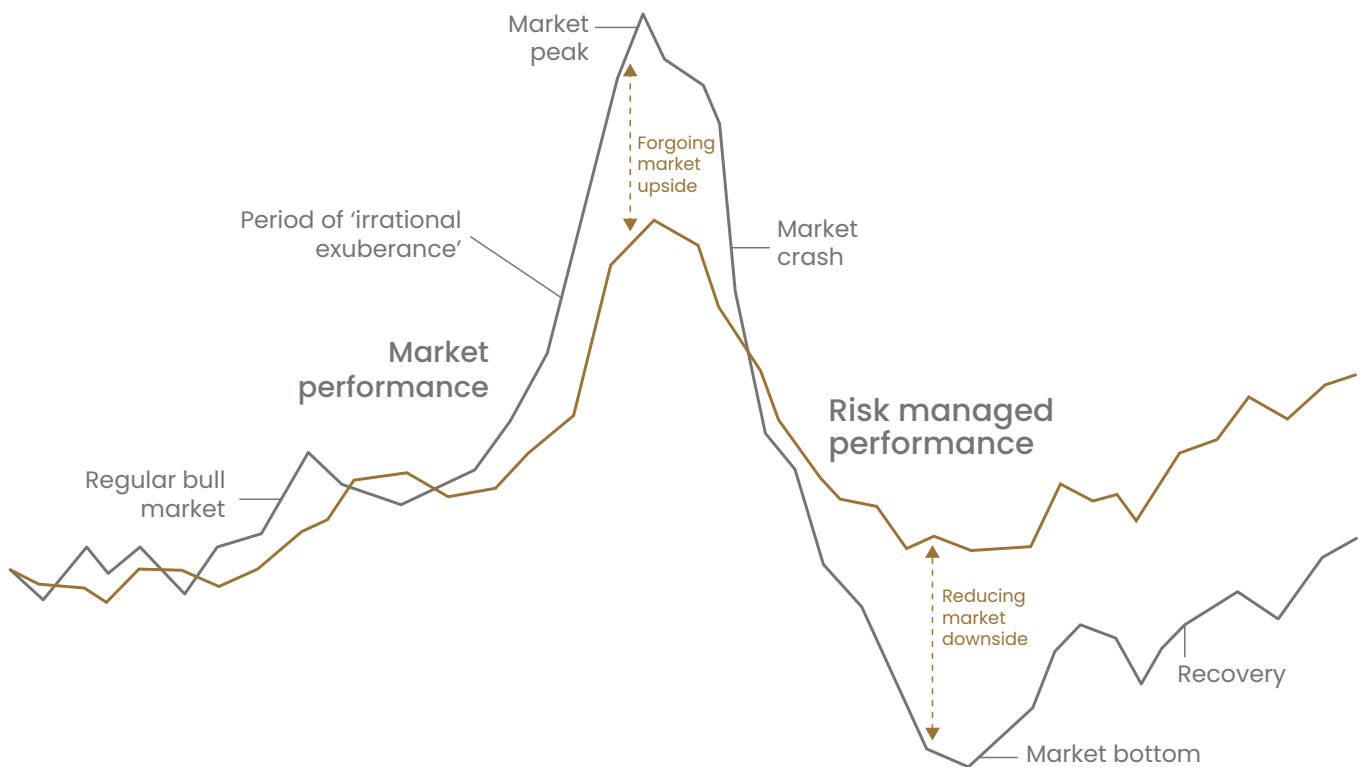
OUR BELIEFS

Like all successful financial advisory businesses, we follow a core set of **investment beliefs**.

These beliefs shape the investment decisions we take on your behalf and give **focus** and **discipline** to the oversight of your investment objectives.

With an extensive background in taxation, our financial advisors look at the big picture, providing you with comprehensive financial advice and integrating tax planning into your wealth creation strategies.





FUNDAMENTAL INVESTMENT PRINCIPLES

We focus on the fundamental principles we believe can give our clients the best chance of success. These principles are embedded in our culture and guide the investment decisions we help our clients make.

- » **Active investment style** – with prudent investment selection and ongoing monitoring an active investment approach can provide opportunities to outperform.
- » **Diversification** – a powerful strategy for managing traditional risks.
- » **Long-term perspective** – time in the market, not timing the market, is a critical factor in investment success. A patient, long-term view helps us stay the course during market ups and downs and take advantage of opportunities when they arise.
- » **Rebalancing** – ensuring your investments are aligned with your personal preference and remain suitable for your tolerance to risk, life stage and individual circumstances

Fusion partners with investment experts as it drives better outcomes for our clients and allows us to concentrate on what we do best – strategic advice and investing more time in our client relationships.

