



# FINANALYZE

## Financial Planning



**we keep  
things simple**



# our background

Formed in 1975, Finanalyze Financial Planning, located in Keilor East, provides quality, personalised financial advice to Australian families & business owners. Since its inception, Finanalyze has continuously achieved industry recognition in providing quality advice and service to its clients.

Finanalyze Financial Planning is strategically aligned with Affinia Financial Advisers Limited, who are independent of the major banks and AMP for licensing and compliance. Therefore, clients are reassured Finanalyze is not conflicted by bank owned licensees and has a full and open approved product list.

Finanalyze and its team are supporters of the local community, sponsoring various sporting clubs within the region and supporting local charities and schools.

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## our core values

### **Trust**

We deliver on our promises.

### **Honesty**

Our advice has your best interests at the forefront.

### **Enjoyment**

We have fun.  
We share in our success.

### **Clarity**

We are transparent and our communications are easy to understand.

### **Personal Development**

We continue to strive to be better at what we do.





# our mission statement

We keep things simple and explain them in a way you will understand

## our guiding principles

1. Having the client's best interests in everything we do
2. Delivering on our promises
3. Working together as a team
4. Keeping things simple



## the specialist areas of advice we include

### Retirement planning

Superannuation, pensions, Centrelink advice, transition to retirement.

### Investments

Managed funds, savings plans.

### Lifestyle & asset protection

Death, disability insurance, trauma cover, income protection.

### Estate planning

Facilitation of Wills.

### Aged care

Accommodation bonds.

# our team



**Craig Saville**  
Senior Partner



**Jeffrey Osborne**  
Partner



**Anne Sammut**  
Associate Advisor



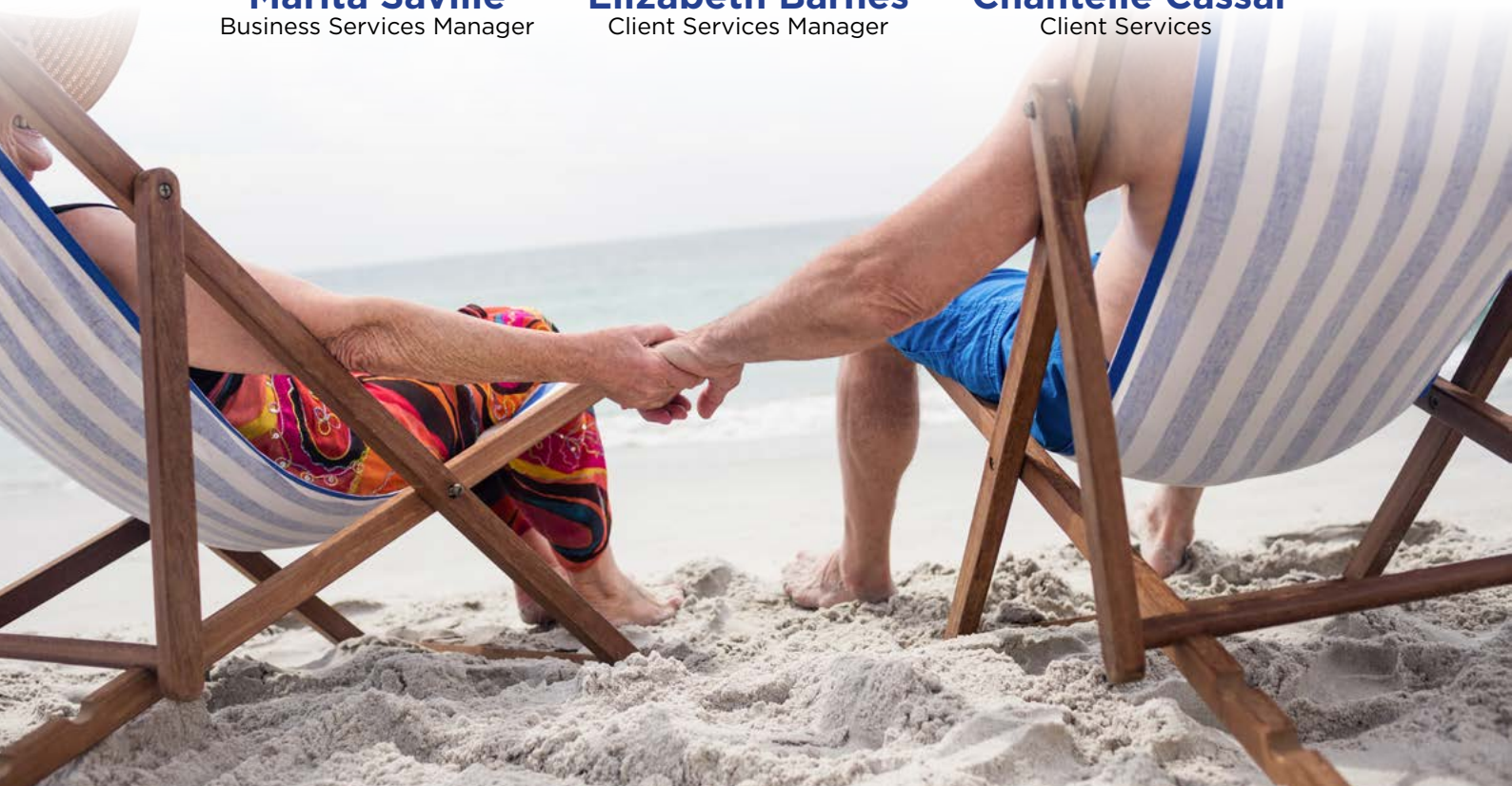
**Marita Saville**  
Business Services Manager



**Elizabeth Barnes**  
Client Services Manager



**Chantelle Cassar**  
Client Services



**FINANALYZE**  
Financial Planning  
**we keep things simple**

## contact us

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