

Batten Financial Services

At Batten Financial Services our goal is to help our clients achieve a more prosperous future by providing them with quality advice. With professional financial planning we can grow your wealth, ensuring a more prosperous future for you and your family.

Tailored Financial Solutions

Investing successfully requires focus and commitment. At Batten Financial Services, we partner with our clients to deliver successful, tailored risk and retirement financial solutions over the long-term.

We offer our clients clear insights and comprehensive tailored financial solutions to ensure their financial strategies remain consistent with changes in their circumstances, legislative updates and product enhancements.

Here's what you can expect from us:

- High quality risk and investment advice;
- Intelligent, individual solutions explained in easy to understand language;
- Consistent exchange of information and open communications; and
- A focused team of talented professionals.



Wealth Accumulation

- Superannuation
- Investments
- Gearing
- Savings plan



Risk Insurance

- Income Protection
- Trauma Insurance
- Life Insurance
- TPD
- Business Expenses



Superannuation

- Fund Review
- Consolidation
- Investment Selection
- Contribution maximisation
- Superannuation strategies



Retirement

- Pre-retirement Wealth Accumulation
- Retirement Income Streams
- Investment Strategies
- Centrelink (DVA) advice and liaison

The value of our financial advice

Client Advice

- Listen to you and discuss your needs;
- Give you confidence, security, peace of mind; and
- Strive to meet your objectives by making recommendations based on sound research

Client Operations

- Prepare and follow-up applications;
- Organise all the associated documentation required; and
- Provide detailed summaries of your file

Client Review

- To ensure your current insurance/superannuation matches your goals and objectives;
- Assess products according to your current circumstances; and
- Advise you of any legislation changes that may effect you

The initial client meeting is free of charge and without obligation. At this meeting we will discuss your options and look at some of the following strategies:

- Using time to your advantage with compound returns;
- Enabling growth and helping minimise risk through a diversified spread of investments;
- Structuring investments according to your family situation to be more tax efficient; and
- Managing assets and using them to build greater wealth.

At Batten Financial Services, it's all about making the most of your insurance, superannuation and investments for today, tomorrow, always.

Contact us

Begin your financial journey today, please contact:

Batten Financial Services

Unit 1, 9-11 Manning Street
South Brisbane QLD 4101

Telephone: 1300 551755

Facsimile: 07 3231 9085

Website: www.battenfinancial.com.au

Hands on experience

Our clients are serviced by a focused team of talented people to provide perspective on your financial solutions.



Colin Batten

Authorised Representative

With over 25 years experience in all aspects of financial planning, Colin has specialised in alternate investment structures and retirement planning.

Along with the responsibilities of the strategic direction of the practice and management of staff, Colin's primary role is to assist clients in achieving their financial and lifestyle goals in retirement.



Michael Batten

Authorised Representative

Michael's role covers a broad range of responsibilities from client interviews, to client strategy and Statement of Advice preparation.

Michael's accounting background and financial planning skills can offer clients a complete suite of financial planning advice including wealth accumulation and risk management.



Steve Antos

Steve has been a Chartered Accountant for over 6 years and has now turned his skills to financial planning. Steve's unique skill sets enables him to add a great deal of value to clients of Batten Financial Services including Wealth Accumulation and Risk Management. Steve also assists in the preparation of Statements of Advice documents and client strategy.



Noel Fawkes

Client Services Manager

Noel holds a Diploma of Financial Markets and has over 12 years experience in the financial planning industry. He has extensive experience in retirement planning, investment, Centrelink strategies and portfolio management.

Noel's primary role is to assist clients in achieving their financial and personal goals in retirement. For most clients, Noel is the first point of contact.