

I've worked in the financial services sector for over 24 years both here and internationally. I met Rex 10 years ago on a professional basis and over the years that relationship turned into a respected friendship. Rex and I share similar values most notably, delivering value and new insights to our clients to improve their financial situation and behaviour with money. What struck me about Rex is his professionalism which has repeatedly been shown through his competence, diligence, fighting/getting the right outcomes for his clients when product manufacturers slip up and his conviction in the products and funds he recommends for his clients. Subsequently, it was no surprise that when I moved from a National Development Management role with AMP into a completely different profession, and despite knowing most financial advisers in Adelaide, it was Rex that I chose to advise my family for our financial needs.

From a client perspective, when it came to meeting Rex, neither did he assume I knew everything about financial strategies, nor did he assume to know everything about my circumstances. He took the time to really go through the detail and covered areas that I had not considered. He discovered opportunities that had developed due to my changing circumstances. At all times he made the complex simple which made my wife, who doesn't have the same financial experience, feel engaged and secure.

Rex understands not only finance, legislation and investments, but how they work in relation to behavioural psychology; a subject we both enjoy discussing together. That is perhaps the most important aspect in many ways. All else fails if the issue of investor behaviour is not understood and included in the process. In other words, financial success is determined by the disciplined behaviour and focus of the individual investor on their circumstances. A quality financial planner will identify and gradually guide behaviour over time. As an observation, investor behaviour is often overlooked by clients and planners alike and too much emphasis is placed on investment performance. Both are required and Rex recognises this.

The advice provided was spot on, leveraging on what we already had and enhancing as additional strategies and benefits were introduced. Advice is one element of the value provided by a good financial planner. Implementation and following up to ensure strategies are pursued to their proper conclusion are equally as valuable and important. Rex and his team of staff at Wealth For Life Financial Planning executed the implementation of his recommendations with precision, always kept me informed in a personable and professional way using the phone and following up with emails.

No one person can be successful without a team of professionals assisting and over the many years I have known Rex, I've observed that he has always attracted and retained staff of the highest calibre. His staff speak equally highly of him, and I know he treats them with the same care as his clients. In a professional capacity the quality of back-office staff has always been a lead indicator to me for the sign of a good business.

It's a pleasure to recommend Rex and his team at Wealth for Life Financial Planning. Now that I've stepped out of the profession of Financial Services, I don't see the need to watch my investments anymore and feel safe in the knowledge that I've delegated that responsibility to Rex.



Stephen Rysdale



Gemma Rysdale