

Our endorsement of the sound financial advice received from Rex Whitford, of

Wealth for Life Financial Planning

More than fifteen years ago, my wife and I were thinking seriously in terms of our retirement and in doing so, began a relationship with a reputable Adelaide company offering financial advice. Within a few years the business was sold to a national financial planning group who we were quite happy to continue to seek advice through. Over the next few years, we were given guidance by two or three of the organization's advisors and felt we were getting sound financial direction. Ultimately, we met their advisor, Rex Whitford. Although we were frustrated with losing previous advisors who we liked and trusted, Rex seemed like a good bloke who we soon found, knew the business thoroughly. Hence, when Rex moved into his own financial planning venture, Wealth for Life, we were more than happy to continue to have him offer investment advice as he had already been very helpful to us over the brief period he had guided us so far.

Since then, we have in no way regretted our decision to continue our financial planning relationship with Rex for one moment. He has completely understood our goals in creating wealth and his financial mentoring has enabled us to achieve them. He introduced us to a strategy where-by we could adjust our portfolio to gain greater wealth, yet not be exposed to greater loses, as is often the case with these plans. With our superannuation investments protected by a guaranteed balance, we have been able to weather storms such as the GFC. By adhering to the right advice from Rex and holding on to our equity portfolio during difficult times while looking to the long term, we have quickly recovered, where friends have watched on and taken big hits, much to their eternal exasperation.

Rex's mentoring has enabled us to use Veterans' Affairs entitlements in conjunction with an allocated pension plan so that it works to our best advantage. His ability to stay on top of the frequent changes to legislation and pass on his expert knowledge to us has given us the peace of mind in not having to wade through the complexities ourselves.

In summary, we would like to say that through our experience we have no qualms in expressing to potential clients that Rex Whitford has consistently made sound financial recommendations to us that are always in our best interests. We frequently mention this important aspect of financial planning to friends and acquaintances who are seeking to create real wealth for themselves, but want to be aware of the pitfalls. What they do then with our recommendation and expression of complete satisfaction with Rex and his capable staff is up to them.

*Dave & Pauline Rickard*

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