

## **Kingsbridge and Eagle joins Centric Wealth**

Kingsbridge and Eagle is proud to announce it is joining Centric Wealth as part of the Centric Wealth Group.

### **Why?**

**So we will be able to assist you with all your financial needs.**

Our vision from Day 1 was to build a business that could help our clients with all their financial needs. Eight years later and we have the largest boutique brokerage in the country, we've established offices in Melbourne and Brisbane, we've written Residential Loans and Commercial Loans. More recently we have added Asset Finance, our new Reconstruction Unit and, as an Authorised Representative, General Insurance. But we want to go further.

Centric Wealth allows us to add the final piece of the puzzle by being able to offer our clients other wealth advisory services such as financial planning and life and term insurance. Not all clients will need all the services we will have but in order to guide our clients through the financial web we want to be able to offer our clients everything they might need and at the same level of service they expect from K&E.

As part of Centric Lending Services we will have significant resources backing our plans for growth. We will quickly be able to match our Sydney offering and service standards in other locations.

### **Who is Centric Wealth?**

Centric Wealth is Australia's leading high-end wealth advisory group, focusing on the financial needs of clients in Sydney, Melbourne, Brisbane and Canberra. It has over \$5.3 billion in assets under advice with a network of 43 advisers across financial planning, risk insurance, corporate benefit services, lending and general insurance. It counts in its ranks a number of industry

pioneers and awarded leaders and has one of the lowest client numbers per adviser in the Australian financial planning and wealth advice industry.

### **Why join Centric Wealth?**

We have had several offers over the years to work with a variety of people and organisations but none of them felt right, until now. K&E and Centric Wealth fit well together. The people are right, the culture is right, the

service standard is right. Both companies are driven by a commitment to high end advice that focuses on each and every client's individual circumstances.

### **Will you still be Kingsbridge and Eagle?**

Our people will remain the same, our service standards and all other aspects of our relationship will remain the same. Our name will change to Centric Lending Services.

We will be shortly moving in to the Centric Wealth offices, from Monday 24<sup>th</sup> September our address and new contact details will be:

Level 2

7 Macquarie Place  
Sydney NSW 2000

PO Box R1851  
Royal Exchange NSW 1225

Ph: (02) 9250 6500

Fax: (02) 9252 2702

Please don't hesitate to call if you have any questions about any of your financial arrangements or if you would like more details about our new arrangements with Centric Wealth.

***“your interests our focus”***

Paul Heilig  
Director

Sheyne Walsh  
Director