



Investment Philosophy

How does Trilogy help you invest?

Understand you

We get to know you and work to understand your investment objectives and risk appetite.



Develop a strategy

We aim to diversify your investments to manage your risk to meet your risk appetite (we do not avoid risk).



Recommend

We recommend investment specialists to manage your diversified portfolio. We explain all fees and costs before you agree.

Review

We check your current objectives in regular reviews and assess your investments are still in line with these. We update you in plain, easy to understand language.

Reviews help you stay on track over the long-term. We also make ourselves available to discuss your portfolio as required.



www.trilogyfg.com.au

We help you to make better financial decisions to live the life you want.

Leadership, Direction, Clarity, Certainty

We build your investment portfolio

Core Asset Classes

Shares

Property

Cash

Bonds

Understand your
objectives & risk
profile

Your portfolio



www.trilogyfg.com.au

We help you to make better financial decisions to live the life you want.

Leadership, Direction, Clarity, Certainty

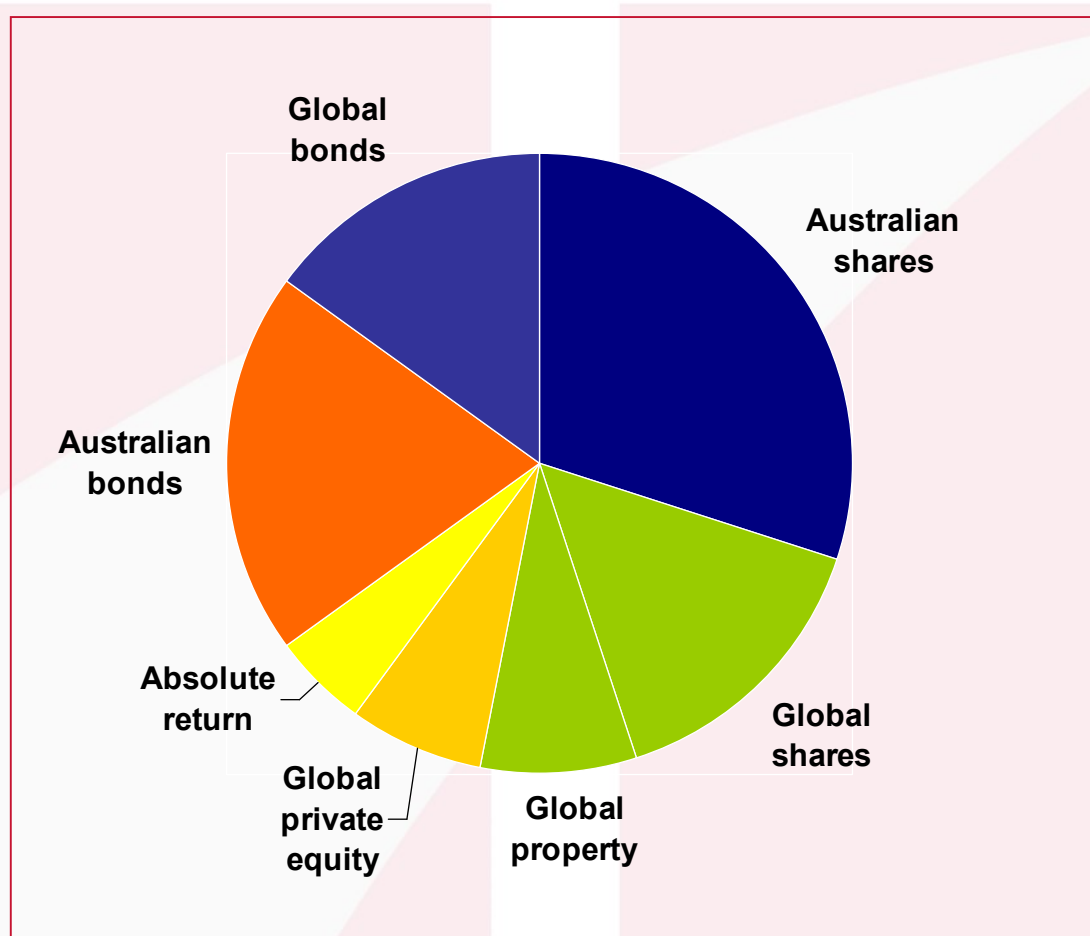
Diversification helps reduce risk

Diversification helps to manage risk, *not* avoid it. We don't "put all of your eggs in one basket".

We diversify a number of aspects of your portfolio:

- Asset classes – shares, property, cash, bonds
- Industry sectors
- Investment managers & styles
- Specific companies
- Countries and regions
- Currencies

We consider any existing investments you have (e.g. investment property, super, shares etc.) and take these into account.



We help you to make better financial decisions to live the life you want.



www.trilogyfg.com.au

Leadership, Direction, Clarity, Certainty

Investing is only part of a wealth accumulation strategy



www.trilogyfg.com.au

We help you to make better financial decisions to live the life you want.

Leadership, Direction, Clarity, Certainty