About Burrell Stockbroking & Wealth Management

THE CLIENT SERVICE

DIFFERENCE

We are a longstanding Queensland company providing full stockbroking, wealth management, superannuation and advisory services to private clients, Not-for-Profit and other investment organisations. As a boutique firm, we offer personalised client service, superior control over trades, unbiased advice and true market insight.

I have grown up in this industry and I am still fascinated by the share market and all things economic and financial. If you are too, follow my Market View blog at www.burrell.com.au/burrell-blog. I would love to hear your thoughts.

Chris Burrell
Managing Director

Established in 1937, Burrell is proud to have achieved over 80 years in the business. We remain one of the last privately held broking firms in the country. This longevity stems from the personal attention, expert advice and wealth of experience we continue to bring our clients.

A proud privately owned Queensland business, we have grown to over 40 staff with offices in Brisbane, Southport, Ipswich, Bundaberg, Emerald, Sunshine Coast, and Hobart. From this base, we visit regional centres and work with clients around Australia.

Burrell offers unparalleled control over the trading process from trade to settlement, giving us a level of efficiency and compliance that other firms can only dream of.

Burrell is one of only two Queensland stockbroking firms who maintain our own in-house stock clearing and settlement operations. Most other broking firms now outsource this vital function. In contrast, Burrell offers unparalleled control over the trading process from trade to settlement, giving us a level of efficiency and compliance that other firms can only dream of. No third party clearing houses, no delay, low cost, and a Burrell expert to see it through.

"Over the 26 years I have been investing through Burrell, they have helped to guide and manage my investment portfolios. I have found them to be trustworthy, reliable, helpful, friendly and courteous. At all times, I have felt they've had my interests at heart."
Neil Baumber, Burrell Client

Our service is our greatest asset

We offer a level of personal service that many bigger commercial firms are unable to match. Our trading, broking, research and settlement teams are close enough that we can afford to interact with our clients as individuals on a first name basis rather than as account numbers. We are proud to attest that we know our clients and our clients know us.

… we can afford to interact with our clients as individuals on a first name basis rather than as an account number.

Our team of advisors come with a wealth of diversified investment skills and experience, but what is even more important is that they have the expert people skills and care factor to complement their financial expertise.

They are here to guide you through a range of specialist services:

- Shares: Portfolio Investment and Trading
- Superannuation and Rollover Funds
- Wealth Management and Retirement Planning
- Estate Planning
- Portfolio Management Services
- Managed Funds
- Money Market Services
- Fixed Interest Investments
- Warrants and Options Dealing
- Execution Services for Overseas Shares
- Off Market Transfers
- Margin Lending Advice.

"Burrell is one of only two companies that we recommend without hesitation, based on trust, integrity and quality service to us for over 26 years. While the other company we'd recommend operates in a different industry, interestingly, it is also a privately owned business of long standing."
Bruce and Joss Duffell, Burrell Clients

About Burrell Stockbroking & Wealth Management

A personal advisor delivering Burrell's best

Your personal advisor is your 'go to' person for everything you need. If for some reason they are not available when you make contact and you require immediate assistance, your nominated second advisor, a Branch Manager, or a Director of Burrell Stockbroking will be.

We know clients can be hesitant to rely on the judgment of one advisor. That is why your personal advisor will always be supported by a Burrell team. Behind your personal advisor stands a second advisor as well as a qualified team of asset sector specialists in fixed interest, property, international shares, managed funds, options, and Australian equities.

Burrell's daily team meetings to share ideas and research, as well as regular supervisory reviews for portfolio clients by Burrell directors, provides multiple inputs on your portfolio and means you and your advisor will never walk alone.

Research you can count on

Up-to-date information is essential in decision making and ensuring that you receive the best advice and recommendations available. Our in-house research facilities include 'live' world and company news services, in-depth profile analysis on listed companies, and, thanks to our alliances with major Australian broking firms, access to a national network of research compiled by renowned analysts and experts.

… Personalised and deep advice built over time, not just blindly following what is hot in the financial media from week to week.

This means personalised and deep advice built over time, not just blindly following what is hot in the financial media from week to week. It also gives us the capacity to cover a larger universe of stocks in-depth and to construct broad portfolios with a wide degree of confidence.

The Burrell Wealth Management team. *Celebrating over 80 years of success as a firm.*

This company research is available to you simply by contacting your advisor or a research analyst. And by joining one of Burrell's portfolio services, a simple password will give you access to all our latest research at www.burrell.com.au.

A private firm placing its clients' interests first

While Burrell has broker access to select floats, placements and IPOs that may not be available to the general public, as a private firm we are less susceptible to the conflicts of interest and pressure to shift product that some larger brokers and underwriters may experience. We are not owned by a bank or other financial institution and pride ourselves on giving unbiased advice.

… As a private boutique firm, we are less susceptible to the conflicts of interest and pressure to shift product.

We are also up-front in relation to fees. Some clients prefer the traditional model of paying brokerage only on transactions. Our preferred model is a lower brokerage fee plus a modest asset fee based on your portfolio value. Either way, your interests and Burrell's are aligned: we are both looking for an increase in the value of your portfolio.

Put simply, Burrell is designed to provide you with a true client service difference.

Contact us

To find out more about us and the ways in which we can help you, contact us at:

P **1300 4 BURRELL/1300 4 2877 355**
W **www.burrell.com.au**
E **clientcare@burrell.com.au**
B **www.burrell.com.au/news-and-events/the-burrell-blog**

General Advice Disclaimer

This document contains general information only and does not take into account your personal objectives, financial situation or needs. You should consider the appropriateness of the information in this document with regard to your objectives, situation and needs. You should obtain financial advice tailored to your circumstances. Contact us if you would like to speak to a qualified financial adviser