



Personally,
**WE CARE ABOUT
YOUR FUTURE**

WHO WE ARE

OUR *personal* TOUCH BUILDS CLOSE RELATIONSHIPS WITH OUR CLIENTS AND OUR LENDERS.

We take pride in personally building longstanding relationships that are based on trust, transparency and superior service.

Excelsior Finance is a Perth-based mortgage and finance broking firm that is fully accredited by the Mortgage and Finance Association of Australia (MFAA).

We offer full-service mortgage and finance solutions. Our core markets include medical, commercial and retail customers, and we help clients all around Australia with their home and business loans.

Our team of experienced finance professionals all have extensive backgrounds in finance and mortgage broking. Collectively, we have in-depth expertise across wealth management, accounting, broker insurance, private and retail banking and credit, mutual funds and asset management.

WE'LL ALWAYS GO THE *extra step* TO MAKE SURE YOU GET THE BEST RESULTS.

98%

OF OUR NEW BUSINESS IS BASED ON PERSONAL REFERRALS FROM SATISFIED CUSTOMERS

WHAT WE DO

WE'LL *personally* SOURCE AND COMPARE AN EXTENSIVE RANGE OF HOME AND BUSINESS LOANS TO FIND THE PERFECT FIT FOR YOU.

As a fully independent broker, we have access to a huge range of loan options from our extensive panel of lenders. Together, we'll find the one that best suits your personal or business needs.

HOUSING LOAN FINANCE

Whether you are a first home owner, an investor or an upgrader, we'll work closely with you and your advisors to find the best product to fit your needs. Our service doesn't stop at settlement either. We'll schedule regular contacts with you to review your loan and make sure that it's continuing to meet your needs.

- › Home loans
- › Mortgage finance
- › Personal lending
- › Asset finance
- › Life of loan service

BUSINESS AND COMMERCIAL FINANCE

Together, we'll add value to your business.

Our complete range of business and commercial finance products, from business and commercial loans and finance to insurance solutions, will create the value you need to take your business to the next level.

- › Acquisition funding
- › Commercial property finding
- › Cashflow finance
- › Insurance premium funding

ASSET FINANCE

We can help you meet your business equipment needs thanks to our access to a wide range of finance lenders. Our product solutions include personal loans that can be used to acquire everything from motor vehicles, boats and machinery to renewable energy equipment.

- › Personal and business loans
- › Personal and business finance
- › Chattel mortgages
- › Hire purchase

HEALTH AND MEDICAL FINANCE

We have specific expertise in the health and medical sectors and will work with you to see your practice grow. Through our lending partners we have access to a wide range of products specifically tailored to the health and medical industry.

- › Practice funding
- › Cashflow finding
- › Equipment finance
- › Personal finance



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WHY CHOOSE US



PERSONAL SERVICE

We take the time to really get to know all of our clients, so that we can provide the level of service you need to get the best results.



FAST AND RESPONSIVE

We'll listen and perform due diligence on your needs and requirements so we can source and recommend the best solutions for you – quickly and effectively.



OPEN AND TRANSPARENT

We'll provide you with a full comparison of any products we recommend, including a breakdown of costs, fees and charges, as provided by the various lenders.



CHOICE

As an experienced broker, we have a vast choice of home and business loans from a wide variety of lenders. This gives us the best chance of finding the loan that's right for you.



EXPERIENCE AND KNOWLEDGE

Our team are all highly experienced finance and mortgage broker professionals who are qualified and accredited through the Mortgage and Finance Association of Australia (MFAA). All of our staff undertake ongoing professional development through the MFAA and Kaplan, a leading provider of professional education and training.



PROFESSIONALISM

We appreciate that you are trusting us with your most important financial, personal and business decisions. We'll give your business the care, attention and respect it deserves.



SUPERIOR SERVICE

We understand that every individual and business is unique in their financial requirements, which is why we'll always go that extra step to understand and deliver the service you personally need.



STRONG RELATIONSHIPS

Building long-term, mutually beneficial relationships with our clients has been the key to our success. Identifying the right strategy and loan for you is merely the beginning of our relationship.



CONFIDENTIALITY

Rest assured that your sensitive financial information is always in safe hands with us. We take security very seriously.

OUR CLIENTS

WE *personally* GUIDE OUR CLIENTS ACROSS AUSTRALIA THROUGH THEIR HOME LOAN AND BUSINESS LOAN DECISIONS, OFFERING HELP AND ADVICE EVERY STEP OF THE WAY.

We specialise in medical, commercial and retail customers and can provide industry-specific solutions individually tailored to your business.

MEDICAL	PROFESSIONALS	BUSINESSES	RETAIL/CONSUMER
<ul style="list-style-type: none">› Dentists› Doctors› Pharmacists› Veterinarians	<ul style="list-style-type: none">› Lawyers› Engineers› Accountants› Self-employed professionals	<ul style="list-style-type: none">› SMEs› Large businesses› Partnerships	<ul style="list-style-type: none">› Singles› Couples› Families



WHAT OUR CLIENTS SAY

"I discovered Excelsior Finance through a referral from a close friend. Mark and the team refinanced my loans, achieving significantly better rates and a cash back and points deal that resulted in a credit to my account after bank fees - meaning I got paid to save money. More recently, Mark contacted me regarding an exceptional deal that was only available for a short time. With his, and the Excelsior Team's assistance, everything was taken care of and I am now enjoying even greater savings that I can use to take the family on regular holidays.

I am now miles ahead with minimal effort and fuss. I have referred friends and family and they are equally impressed. Highly recommended."

Craig Foreman
Financial Controller

"Thanks to the Excelsior Finance team, and particularly David James for his professional advice and expertise guiding us through a significant financial restructure which has proven to be of great benefit to us and our business. We appreciate his skill in understanding our requirements, sourcing the right products and persistence in successfully closing the deal. We also appreciate his integrity and honesty throughout this process. We expect to build on this relationship and would thoroughly recommend his services to any prospective customers."

Andrew Foley
Managing Director

"David, Bonny and Mark provided outstanding service with our recent home loan application. Financial institutions have many forms to fill out, however, the Excelsior Finance team clearly explained and guided us through each step of the process. Their attention to detail, and accuracy in completing the necessary documentation meant the whole process ran smoothly, easily and was extremely efficient."

Paul & Valerie Byrne


"Excelsior Finance recently helped me navigate a very complex business loan. Their communication and level of customer service was better than I have very experienced. I highly recommend their services for both business and home lending. Best in the business!"

Nic Blackah


GET IN TOUCH


WE'RE HERE TO HELP YOU REACH
your goals. **CONTACT US TODAY**
FOR AN OBLIGATION-FREE CHAT.


 **WEB:** excelsiorfinance.com.au

 **PHONE:** +61 8 9384 6924

 **EMAIL:** info@excelsiorfinance.com.au

 **FACEBOOK:** Find us on Facebook

 **INSTAGRAM:** Find us on Instagram

 **LINKEDIN:** Find us on LinkedIn