

bartons news.

the latest update on our 3 pillars for our valued Bartons clients



seasons greetings!

All of us at Bartons hope you are coping with one of the strangest years any of us have ever experienced!

The demands on the Bartons team have been substantial. We've been helping businesses navigate JobKeeper and related incentives, making payment arrangements with the ATO, arranging home loan pauses and rebalancing investment portfolios, to name a few.

Please note, our office will officially close on 21st of December, and re-opening on the 4th of January.

We wish you and your families a wonderful Christmas break and a Happy New Year!

Chris Waples, Managing Director

did you know?

Bartons offer lending services in-house?

Matt Stouppos, Associate Director, leads a team that can assist with all things lending, including home loans, business loans, investment loans, car loans, refinancing and review of your existing structure.

Your first meeting is at our expense, so you have nothing to lose! You can organise your finance check-up meeting with Matt Stouppos or Louis Spencer, fellow Lending Adviser, by submitting an online enquiry via our website, or sending an email to hello@bartons.com.au.

We can't wait to help you with your lending needs!



investment update

With the recent election of President Joe Biden in the USA, and the Reserve Bank setting the cash rate in Australia to an all-time low, financial markets have remained volatile.

Through the expertise of Bartons Portfolio Manager Adam Musolino, we achieved positive returns for the 2020 calendar year to date. We recently hosted an online Zoom seminar to our Bartons Financial Services clients, with a market update and predictions for the coming 12 months.

For further information regarding financial markets and our investment approach, please get in touch with us!

IN THIS ISSUE

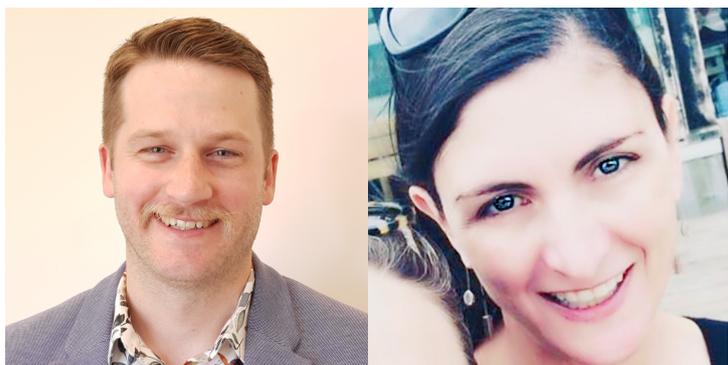
seasons greetings

did you know?

meet the team

investment update

community news



meet the team

Jordan Kitto - Financial Adviser

What was your first job? Newspaper boy, that only lasted a week! I then worked in Fruit & Veg for 5 years

Favourite holiday destination? Coles Bay, Tasmania

What do you like to do in your spare-time? Deer hunting and road cycling

Do you have any pets? I have 2 cats, Sahani and Peanut

Are you binge-watching anything right now? The Mandalorian

Samantha Quirk - Client Services Co-ordinator

How long have you been working at Bartons? Just over 25 years now!

What show are you binge-watching? The Block, gives me plenty of inspiration for my house.

Do you play any sports? Pennant Tennis, both summer and winter, for 38 years!

What's the best concert you have been to? Rolling Stones at Adelaide Oval 2017



competition winners!

Thanks to the many who entered our competition in October, showing off your hobbies picked up during COVID-19.

Congratulations to our winners, Cheryl Wilson and Alison Fleming, you have won the Hamper Emporium gift baskets!

Cheryl fell in love with making artisan bread, while Alison decided to really challenge herself and learn playing the French Horn!

community news

October, November and December were a busy few of months in our community, with initiatives across a number of charities.

Our Future Generations Investment (FGX) investors were instrumental in allowing us to donate a massive \$66,068 across Hutt St Centre, Childhood Cancer Association and The Village Co.

9 courageous Bartons staff members grew their upper lip during Movember, raising an amazing \$5,195 during the month, going towards Men's Health. By the final week of November, things were getting a bit hairy in the office! You can check out some of the mo-gress below!

Lastly, we took part in the Smith Family Toy & Book Appeal, donating several gifts to help children in need and help create a sense of belonging this Christmas.

The generosity of Bartons staff was immense, and we are hopeful that the many donated gifts will go a long way towards put a smiling face on so many children this Christmas!

