

Established in 1997, Avallis Financial (formerly First Principal) is a leading Independent Financial Advisory firm based in Singapore. We provide financial products and advisory services to individuals and companies across the region. Our expertise is in the areas of investment, insurance, estate distribution, succession planning, retirement, mortgage loans, employee benefits, business continuation and general insurance brokering.

Avallis
Financial Formerly
First
Principal

The Advantage is **Clear**

At Avallis Financial, we empower our clients to own their wealth journeys. Through our collaborative and educational approach, our clients gain the confidence and knowledge required to facilitate decisiveness. Our sincere and insightful manner of advisory further supports you as you pursue your specific financial objectives and life aspirations, always a step ahead.

avallis.com
Ability. Objectivity. Clarity.

PUTTING THE EDGE IN KNOWLEDGE

At Avallis Financial, we believe in client education because knowledge is power. This is why we dedicate ourselves to delivering well-timed, market-leading advice, information and resources – to help you make informed choices, and the necessary edge in your wealth management strategy.

Discover a world of new financial possibilities with our contemporary strategies and extensive range of investment and insurance products. Our team of experienced advisers is constantly engaging new ideas and concepts to help you achieve your financial goals. We are backed by the latest tools and technology which equip us to research, monitor, and recommend a customised financial plan for your portfolio.

THE POSSIBILITIES ARE ENDLESS

OPEN AND TRANSPARENT

We put it in our highest priority to provide you with clarity and upfront awareness of the costs and risks associated with your investing decisions. Our advisory model ensures that you have clear visibility of your portfolio, as well as absolute control over your investments.

Because Avallis is not affiliated with any financial institution, you can rest assured that we act in your best interest. Our objective recommendations will give you the confidence that our financial advice is truly neutral and unbiased.

UNBIASED ADVISORY

Summary of Services

DISCOVER THE DETAILS

To find out more on how you reap the full benefits of our products and services, simply call us at 6220 5333. Our experienced, client-centred and friendly advisers are committed to providing you with sound and objective advice. At Avallis, The Advantage is Clear.

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PERSONAL

PERSONAL FINANCIAL PLANNING

- Child education planning
- Insurance planning
- Estate planning
- Retirement planning
- Medical insurance planning
- General insurance

INVESTMENT PLANNING

- Investment advisory services
- Risk coaching
- Fund selection
- Asset allocation
- Performance reports
- Portfolio re-balancing

CORPORATE

GENERAL INSURANCE

- Liabilities
- Personal lines
- Property and casualty

EMPLOYEE BENEFITS PLANNING

- Group Insurance Plan
- Group Medical Plan
- Global Health Plan
- Compensation & Benefits Plan

BUSINESS CONTINUITY PLANNING

- Key persons planning
- Buy-sell arrangements
- Guarantor family protection
- Legacy planning