



How we can help your friends and relatives

We are passionate about delivering confidence, control, choice and opportunity, and are committed to building and sustaining strong relationships with our clients.

We offer the comfort of knowing that you have a professional team working with you to develop innovative and dynamic financial solutions tailored to your personal circumstances.



We love to help friends, family and colleagues

Most of our new clients find us through an introduction from an existing client. We love to help friends, family and colleagues of our existing clients who might be in situations like...



WORKING HARD IN THE RUN TO RETIREMENT

- ▶ Couples aged 50 -65 years
- ▶ Maybe empty nesters
- ▶ Could be considering downsizing
- ▶ Not sure if they have sufficient superannuation to retire
- ▶ Unsure how superannuation and Centrelink benefits rules work
- ▶ Will I outlive my money?



BUILDING WEALTH TOWARDS FINANCIAL INDEPENDENCE

- ▶ Couples aged 35 - 50 years
- ▶ Generally, both working (one partner may be part time)
- ▶ Typically, busy households with little time to plan their future
- ▶ Concerned about how to fund private school fees
- ▶ Unsure if they are getting value for money from their home loan
- ▶ Wondering should I pay off my mortgage faster or invest?
- ▶ Earning good money however we are not saving anything



SMALL BUSINESS OWNER WORKING HARD & TIME POOR

- ▶ Successful business owner always busy
- ▶ Their household is typically busy with little time to plan for their future
- ▶ Concerns about what happens to my business if I get sick?
- ▶ My business is my superannuation - I have no plan B
- ▶ When can I take a holiday from my business?
- ▶ The business is going well though it would be nice to have some income from somewhere else

CONTACT US

If you know someone who may need some help to secure their financial future, please ask them to call us for a useful, no-obligation chat.

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