

Your future counts

YOUR WEALTH JOURNEY

YOUNG & SINGLE

- Goal setting
- First job, managing income
- Protecting your income and assets
- Lifestyle expenses, education, travel
- Paying rent, or saving for first home
- Planning for future savings
- First investments, savings plan



IN A RELATIONSHIP

- Goal setting
- Sustaining long term investment and superannuation/SMSFs
- Starting a family
- Buying a home
- Protecting your income and assets
- Buying a car
- Lifestyle expenses
- Estate planning



RELATIONSHIP/ WITH YOUNG CHILDREN

- Goal setting
- Planning and strategies for superannuation/SMSFs
- Children's education
- Finance – mortgage, car, renovations
- Investment strategies
- Government allowances
- Retirement goals
- Estate planning
- Protecting your family



RELATIONSHIP/ WITH ADULT CHILDREN

- Goal setting
- Superannuation strategies/SMSFs
- Retirement strategies
- Pay off the mortgage and contribute to superannuation
- Protecting your income and assets
- Investment strategies
- Retirement goals
- Top retirement mistakes
- Estate planning
- Transition to retirement



RETIRED

- Goal setting
- Superannuation and pensions
- Reverse mortgages
- Estate planning
- Centrelink
- Upgrading the car
- Aged care planning
- Protecting your income and assets
- Downsizing home



L I F E S T A G E >>



BUSINESS OWNERS

- Superannuation opportunities/SMSFs
- Employee benefits
- Business insurance
- Business loans
- Equipment finance & leasing
- Succession planning and managing business risk

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