

Wealth Management



“ We take the time to understand what is important to you ”

We are focused on helping you achieve what is important to you in life.

We understand life can be busy, making it hard to find time to plan ahead. By engaging with our Wealth Management team you can have confidence that a personal plan is created to help you meet your goals. We understand that one size does not fit all when it comes to financial advice. Therefore, our talented team takes the time to understand what each client values and tailors their advice to these factors.

Our qualified advisors will take the time to listen to what is important to you, to better understand what you want to achieve in both the short and long term. We will document a plan to help you achieve your goals, by structuring your financial affairs to ensure you are making sound choices with your money. Our commitment is to keep you 'on track' by monitoring your investments and personal circumstances, and making recommendations as required.

One of the joys of financial planning is the long- standing relationships we have with our clients. We value this privilege. We would love to work with you and celebrate in your success!

Our advisors are Authorised representatives of Count Financial Group (AFSL No 22732)

Services we offer

In addition to preparation of personal financial plans our team can provide the following services:

- Investment advice
- Superannuation advice including self-managed superannuation funds (SMSF)
- Cash flow and budgeting
- Insurance advice
- Aged care advice
- Estate planning

Lending

As your circumstances change, so should the options available to you. Reviewing loans on a regular basis is recommended to ensure you are not paying unnecessary fees or interest. We review your current arrangements as well as offer in house services for both residential and commercial lending. We focus on sourcing the best loan for you with the right terms and flexibility. We have access to a wide range of lenders to find the best product and rates available. Our lenders include CBA, NAB, ANZ, Westpac, Macquarie, ING and more.

