

What's important to you?

What's important to you about your family?
What do you value most about your lifestyle?
What's important to you about your health?
What are your career goals?
How do you feel about your investments?
How would you describe your ideal retirement?
How important is financial protection for your loved ones?
What are your estate planning and legacy goals?
What is important to you about your community?
How important is peace of mind regarding money?

Are you on track?

Can your lifestyle goals be achieved?
Can you expect to do the things you enjoy?
Will you spend your time with those you care about most?
Are your assets managed so as to provide peace of mind?
Are those you love adequately protected?
Will your estate wishes be met?

Where are you now?

What are your Assets or what do you own?
What are your Liabilities or what do you owe?
What is your Income or what do you earn?
What do you spend regularly?
How much do you save regularly?
Do you make additional superannuation contributions?
What loan commitments do you have?
Do you use any Business Structures?
Do you have Wills & an Estate Plan?
Do you have an Enduring Power of Attorney or Guardianship?

How much better could your future look?

Clear projected financial improvement
Increased future assets
Lower tax liabilities
Lower investment fees
Increased retirement income
Correct assets ownership
Adequate family insurance protection
Sound estate planning outcomes

How can you improve your future?

Understanding your future cashflow
Lower tax liabilities
Evidence based portfolio construction
More reliable investment returns
Improved retirement income reliability
Utilising all available financial strategies
Improved ownership of assets
Comprehensive estate planning

What's getting in your way?

Could you be paying less tax?
Do you lack a structured investment process?
Are you paying excessive fees?
Do the right people or entities own the right assets?
Is your investment risk managed appropriately?
Are your family at risk from premature death or disability?
Is your estate planning incomplete?
Are you missing strategic planning opportunities?

