

Our Services Explained

Tick against any services that you may interest you ✓



Getting to know you	<p>Arrange to meet you at a convenient time</p> <p>Gather all necessary information required such as tax file numbers, contact details, copies of relevant identification for the anti-money laundering requirements, authorization to gather information on your behalf for current superannuation and insurance policies</p> <p>Gather all information on personal details such as assets and liabilities, current investments and insurances, what kind of retirement you would like to achieve, how you currently plan to fund your goals and objectives</p> <p>Timeline planning which helps to determine goals and objectives, and to be able to assist in bridging the gap between where you are now and where you want to be</p>	
Wealth Management (Ongoing fees apply - \$600 p.a. <\$50,000 1.2% p.a >\$50,000)	<p>Construction of an investment portfolio using an available lump sum</p> <p>Review of existing investments (managed funds/shares)</p> <p>Producing a required level of after tax income from your investments</p>	
Cash flow management plan	<p>Advice on the investment of your surplus income</p> <p>Ability to save for future expenditure</p> <p>Providing for anticipated capital spending</p> <p>Advice on salary packaging</p> <p>Help you meet your liquidity requirements</p> <p>Budget planning and real-time tracking for 12 months</p>	
MyGov setup	<p>Setting up emails on to mobile devices</p> <p>Setting up log in details and passwords</p> <p>Link government services to the MyGov account</p>	
Super	<p>Advice on building your super assets</p> <p>Consolidation of your individual super funds into a single fund</p> <p>Desirability or the suitability of a Self-Managed Super Fund</p> <p>Perform lost super search</p> <p>Determine your individual investment risk profile</p> <p>Compare existing superannuation funds on features, fees, investment choices and performance</p> <p>Supply super choice forms to employers</p> <p>Complete binding nomination forms</p> <p>Manage all rollovers</p> <p>Invest as per your risk profile</p> <p>Ensure all contributions are going into the correct accounts</p>	
Projections of super/pension balances	<p>Determine whether there will be enough funds to finance retirement</p> <p>Determine how much you will need in your retirement</p> <p>Help you to decide when you would like to retire</p>	

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<p>Contribution advice - concessional and non- concessional</p>	<p>Compare effects and benefits of salary sacrifice (concessional contributions)</p> <p>Explain tax advantages</p> <p>Discuss strategies with your accountant</p> <p>Assessing your eligibility for government incentives for non-concessional contributions</p> <p>Ensure contribution caps/regulations aren't exceeded</p>	
<p>Transition to Retirement Strategy</p>	<p>Explain the strategy</p> <p>Explore the suitability and tax effectiveness of a TTR strategy</p> <p>Show projections of the effects of the strategy</p> <p>Prepare the necessary applications and paperwork</p> <p>Ensure the strategy is implemented correctly</p> <p>Assist with employers in the initial set up of the strategy</p>	
<p>Centrelink assistance</p>	<p>Obtain Centrelink benefits</p> <p>Help with all application forms</p> <p>Register as a nominee for your Centrelink account to help with the initial application and future dealings</p>	
<p>Personal Protection</p>	<p>Analyse your risk insurance needs</p> <p>Review your existing risk insurance policies</p> <p>Investigate insurance options</p> <p>Obtain quotes and talk to underwriters</p> <p>Assist with the completion of the application including all necessary paperwork</p> <p>Follow up insurance applications & negotiate with underwriters</p> <p>Assist in making claims</p> <p>Explain the effects on having insurance premiums in super versus outside super</p>	
<p>Starting a Self Managed Super Fund</p>	<p>Assist you with your SMSF. For example, we help with the administration duties to ensure the SMSF's are compliant with the ASIC requirements to avoid our clients facing hefty fines</p> <p>Organise the Recourse Borrowing arrangements so that you can borrow funds in your SMSF to purchase property</p>	
<p>Changing over SMSF administration</p>	<p>Thorough audit and checklist of your current SMSF setup</p> <p>Ensure compliance to SIS regulations, including minutes, forms, consents and other documents that need to be executed when making changes</p>	
<p>Succession Planning - complex Risk</p>	<p>Assist you and your family when you are engaging the succession planning process with complex Personal Insurances to help with the planning process</p> <p>Liaise with accountants and solicitors involved in this complex process</p>	
<p>Direct shares or non standard portfolios</p>	<p>Manage your direct share portfolio, including the buying and selling of shares</p> <p>Provide you with updates on the assets performance</p> <p>Provide your accountant with reports at tax time</p>	