

PRIVATE CLIENT



RISK MANAGEMENT



INVESTMENT



FINANCE



LEGAL



ADVISORY & TAX

PROTECTING YOU

- Income Insurance
- Disablement Insurance
- Life Insurance
- Trauma Insurance

PROTECTING YOUR ASSETS

- Home & Contents
- Artwork & Valuables
- Car & Rental Properties
- Boat Protection

ASSET ALLOCATION

- Fixed Interest & Bonds
- Cash Return Maximiser
- ETF's & SMA's
- Property
- Equities

PERSONAL STRATEGY

- Tax Effective Investing
- SMSF & Superannuation
- Cash Flow
- Wealth Portal
- Retirement
- Sophisticated Investor Offerings

STANDARD LENDING AREAS

- Residential Mortgages
- Investment Properties
- Credit Cards & Banking
- Personal Loans
- Self Employed
- SMSF Lending
- Line of Credit Facilities
- Car Leasing

NICHE LENDING AREAS

- Credit Impaired Loans
- Short Term Loans
- Reverse Mortgages
- Debt Consolidation

CONTRACT REVIEWS

- Employment Agreement
- Contract Engagements
- Diligence

ESTATE PLANNING

- Complex Family Affairs
- Testamentary Trusts
- Standard Wills
- Power of Attorney

PROPERTY & CONVEYANCING

- Residential Conveyancing

ACCOUNTING & TAX

- Private Tax Rulings
- Depreciation Reviews
- Company Tax Returns
- Salary Packaging
- Investment Property
- Tax Advice
- Tax Effective Structuring
- Personal CFO Services
- Individual, Trusts, Partnerships & Personal Holding

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