

Advancing Your Advantage

Financial planning is the art of providing solutions to your personal financial situation.

It's the process of shaping your financial profile to ensure the best fit for the different stages of your life.

It transforms small opportunities into great enterprises.

It allows you to overcome lifestyle changes, whether it is personal or financial.

It's a service that will shape your future... intelligently.

Financial planning is a process that recognizes the importance of obtaining clear and precise information that allows us to provide you with value added financial advice.

It's a value that derives its strength from the consistency in our approach to your circumstances, and your need for flexibility and security in your financial solutions.

If success is a state of mind it requires a great **partnership** built on trust, honesty and attention to your individual needs.

It's a partnership that evolves from business ethics.

It's a partnership that evolves from our dedication to client needs.

It's a partnership that transforms your visions of success into reality.

**The advancement of your success
is the ultimate advantage -
for you and for us.**

Planning your lifestyle



is our business

Advanced Financial Planning



Advanced Financial Planning is a progressive firm.

It's a firm with **state-of-the-art** financial planning expertise.

We are here to inspire your vision of financial independence.

We are here to advance your lifestyle.

We are here to drive your success.

Our vision is

To be a market leader in helping our clients prosper and succeed

through ethical and professional financial planning advice.

Our mission is

To develop a trustworthy and mutually beneficial partnership with our clients that will meet and exceed their expectations by providing service excellence, and innovative and comprehensive solutions to their financial needs.

Planning your lifestyle



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Advancing Your Lifestyle



Advancing your lifestyle is about success and prosperity.

Our clients plan their **success**.

Our clients drive their **prosperity**.

Our clients become **financially independent**.

Advancing your lifestyle is about good financial planning advice and that's where you can rely on us.

Our expertise evolves from a solid financial planning advice:

Confident - because of our attention to details and openness to all your questions.

Experienced - because of our focus on continuous learning.

Successful - because of our strong empathy for your needs.

Our expertise will advance your lifestyle.

Advancing Your Service

Our service will meet and exceed your expectations.

First we need to understand your individual circumstances and research all possible options.

Then we will design a strategy and build an investment portfolio that will effectively support your desired lifestyle.

Finally, we will monitor the changes that may affect you and your portfolio.

Our services will take away your fear of investing and provide you with the peace of mind that you desire. The communication between us will remain open constantly so as to ensure we provide the best possible service in a changing world.

We will manage your portfolio by the state of the art technology that will design the best possible scenario to reach your goals and objectives.

Our solutions aim to satisfy your needs by giving you access to a wide range of researched investments, financial services and referrals to other professionals.

Our solutions will be written in a plain and easy to understand language.

Our solutions will help drive your financial independence.

Our solutions will enhance your own financial endeavours.

Our solutions will advance your lifestyle.

Advancing Your Wealth

When Building Your Wealth we may utilise tools such as:

- Superannuation (personal, employer, self managed)
- Savings plans
- Gearing (borrowing to invest)
- Investment strategies
- Salary packaging

Enjoying Your Wealth will demand the best strategies:

- To reduce Taxation liabilities
- To obtain your entitlements to any Social security and veteran affairs' support
- To ensure your Retirement Planning (rollovers) goals are achievable.
- To protect your family against accident, sickness or premature death.
- To ensure sufficient Retirement Income to maintain the lifestyle you have become accustomed to.

Protecting Your Wealth requires that we are in tune with your wishes in regards to:

- Estate planning
- Succession planning
- Wills
- Power of Attorney
- Testamentary Trusts

"Man's dream is to live and experience a full life in comfort and in peace."

Advancing Your Future



Our dreams evolve around the aspiration for success:
Your success. Our success.

By advancing your solutions we will perfect the future:
Yours and ours.

There is no royal road to financial success...but

The road we know ...

Will shape your future towards financial independence.

The road we know...

Will allow you to enjoy your lifestyle.

The road we know...

Will help realize your dreams.

What you are striving to achieve,

Taking you where you want to be.

**Your lifestyle is our business.
Consider us
Advanced Financial Planning**