

# Financial planning

## More than just advice

Security and confidence in your financial future are crucial, yet the financial services market is often complex and overwhelming to navigate. A myriad of options exist, so when it comes to managing your wealth, the right advice can make all the difference.

Whatever your stage of life, our expert financial planning team ensures your financial future is in safe hands.

**At Nexia Australia, we provide specialist financial insights, advice and support to help you reach your true potential.**

## Services

- Appropriate long-term investment strategies
- Wealth accumulation plans
- Retirement planning
- Social security related advice
- Personal and corporate superannuation structures
- Life and risk insurance planning
- Estate and business succession planning
- Portfolio monitoring and review service

## Ensuring you're always ready for what's next

At Nexia Australia, our financial planning team provides objective, professional advice tailored to your individual financial situation, goals and life stage. With regular reviews, we ensure your financial plan remains current, sound and feasible.

We're committed to joining you on your financial journey by assessing your financial health, establishing achievable goals, developing a comprehensive plan and monitoring its progress to make sure you're making the best financial choices for your future.

We will be right alongside you to guide you through life's important financial milestones. With our transparent and proactive approach, we take the time to communicate market conditions, investment products, tax laws and legislation changes enabling you to make informed decisions and supporting you to reach your personal and business financial goals.



### **Taylor Brammer Landscape Architect Pty Ltd** Iain Brammer

"When we negotiated to sell the business via management buyout, the level of service and project management was both outstanding and essential to the success of a complex task. We now engage with Nexia to provide ongoing family tax, superannuation and financial planning advice."

### Who we are

At Nexia Australia, we are dedicated to helping you reach your true potential. We are your personal finance and business partner with the resources and expertise to help you navigate complex financial challenges and achieve your goals.

Our carefully integrated suite of services, encompassing taxation, superannuation, business advisory and audit, provides comprehensive support for the 'big picture' of your business and personal financial well-being.

Leveraging a global network of more than 519 offices spanning over 119 countries, we possess the capabilities and in-depth knowledge to offer the insight, advice and support you need. From building wealth to safeguarding your assets, we're committed to supporting you every step of the way.

## Contact us

Contact your local Nexia Advisor to discuss how we can help you and your business.



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**Advisory. Tax. Audit.**

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