ActOn Wealth
Act On Your Future

Boutique Financial Planning

To Create And Manage Your Wealth

About Us

ASSISTING CLIENTS WITH ALL FACETS OF THEIR FINANCIAL LIVES

ActOn Wealth is a boutique financial planning firm that strives to create and maximize the wealth of our clients.

Our mission is to forge long term trusting relationships with our clients and to deliver high quality financial advice with exceptional outcomes.

Our vision is for all ActOn Wealth clients to become our company's greatest advocates

Our core values:

Trust — Dedication — Dependability — Efficiency — Consistency

Why Work With Us?

- Complimentary initial consultation
- Forefront of technology
- Tailored & goal-oriented advice
- Ongoing financial mentoring & education
- Innovative & streamlined approach
- Proactive & impartial advice process
- Consistent & relevant client communication
- Holistic financial solutions
- Tertiary qualified advice team
- Established industry relationships

Our Team

Advice Team

Our advice team is committed to providing an outstanding service to our clients. We are dedicated to assist you with:

- Cash flow management & debt reduction strategies
- Wealth creation & tax minimisation strategies
- Superannuation & Self-Managed Superannution advice
- Risk protection & estate planning strategies

At ActOn Wealth you can always count on dealing with a highly qualified and experienced financial adviser to provide you with holistic strategies specifically tailored to your situation.

Lending Team

Our lending team provides you with strategic credit advice that can assist you with:

- Strategic debt reduction strategies
- Owner occupied lending
- Investment lending
- SMSF lending
- Commercial finance
- Asset and car finance

As your lending specialist, we will step you through the borrowing process and provide you with a personalised loan structure that meets your needs.

Property Team

Our team at ActOn Property Australia researches property on a national basis. Our team can assist you with:

- Owner occupier acquisition and sale
- Investment property acquisition and sale
- Subdivision and development advice
- Feasibility studies
- Independent market research

We take an unemotional approach to property investment, analysing the residential market using an in-depth eight point criteria for selection.
Our team will provide an end-to-end solution to help you acquire the right property investment that meets your needs.

Our Services

Cashflow & Budget Management

We analyse your cashflow and create a personalised budget to make your money work harder for you. By making informed decisions, you'll realise your financial goals faster.

Wealth Creation

Investing can be pretty daunting, with seemingly endless options and possibilities. In order to create the right investment strategy, we first need understand why we're investing. We're here to help you figure that out.

Risk Protection

Protect you and your family from unexpected situations that may impact your financial security and standard of living. Talk to us about one of financial planning's fundamental pillars:
risk mitigation.

Lending Advice

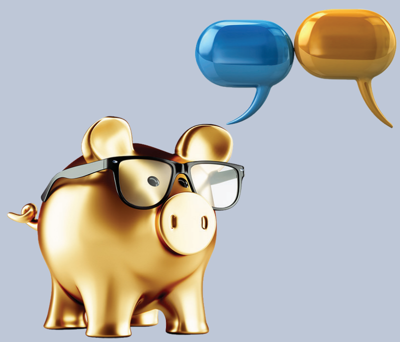
We provide credit advice, together with mortgage and other loan broking services. Researching finance options from various financial institutions can be very cumbersome and confusing.

Our Services

Retirement Planning & Superannuation

A well-managed superannuation fund is the key to funding your retirement lifestyle. From investment options to Self-Managed Super Funds, we'll have the right advice for you.

Self Managed Superannuation



We assist our clients with an end-to-end solution, helping them establish a Self-Managed Superannuation Fund and take control of their retirement. With access to a team with a wealth of experience, you can rest assured that the most suitable structure and strategy is put in place.

Direct property advice

Property can be a great way to diversify your portfolio and get a regular income stream. We will design a strategy that suits your individual needs and circumstances.

Estate Planning

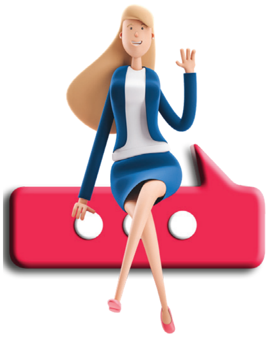
Leaving a legacy is a vital part of wealth creation. We work closely with you to create an estate plan to preserve your wealth and support the ones you love.

Service Offerings

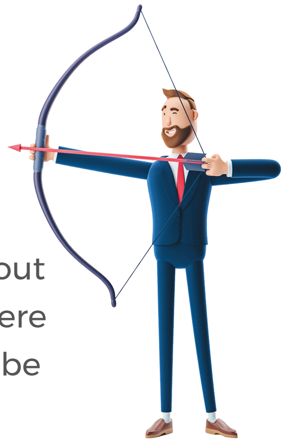
	LEVEL OF SERVICE		
	Direction	Strategy	Vision
Access to Financial Planner	✓	✓	✓
Access to Wealth Hub	✓	✓	✓
One Formal Review	✓	✓	✓
Ongoing Phone Support		✓	✓
Portfolio Reporting		✓	✓
Educational Services		✓	✓
Annual Projections		✓	✓
Strategic Lending Advice		✓	✓
Access to Realty Team		✓	✓
Reviews as Required			✓
In-home Meetings			✓
Strategy as Required			✓
Claims Assistance			✓
Financial Education for Children			✓
Meeting with 3rd Party Professionals			✓

Engagement Process

Beginning Your Journey Is Simple



We meet at your place, online or in our office



Let's talk about you, and where you want to be

Then we get to work and map your journey

Presentation Day – Your goals, the path and realising the benefits

We provide the tools and know-how to make it happen

A long-term partnership is the key to long-term success!

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12/37-39 Albert Road Melbourne VIC 3004

Phone: 13000 ACTON

Fax:(03) 8692 6959

www.actonwealth.com.au