

GET STARTED NOW

Talk to us today to eliminate the worry of managing your own personal finances. Arrange a free one-hour consultation with one of our expert financial managers.

Visit us, or we can come to you:

Level 2, 15 Queen Street, Melbourne
Ph: **(03) 8610 1700**
Email: info@yourpersonalcfo.com.au

For more information, visit our website:
www.yourpersonalcfo.com.au

Take control of your personal finances



Identify opportunities to save more money



DOES THIS SOUND LIKE YOU?

- Personal finances out of control
- Not sure where your money goes
- Overwhelmed by paperwork
- Not enough time for everything
- Potentially missing opportunities
- Late payment fees stacking up
- Tax time is a nightmare ...

We created this service for people just like you. Whether you're an executive, professional, expatriate, wealth accumulator, small business owner, retiree or have special needs, we're here to ease the burden of managing your personal finances.

STOP WORRYING ABOUT YOUR MONEY

Time is not always available to manage your personal finances the way you'd like to. Imagine the freedom of knowing it's being taken care of by a trusted professional while you're busy at work or enjoying the family.

That's exactly what Your Personal CFO gives you.

GET YOUR LIFE BACK

From setting up a budget to paying your bills, we make sure you're making the most of your money. We manage the day-to-day details of your personal finances, so you can spend time on things you actually enjoy.

KNOW WHERE YOU STAND

To get ahead, you need to understand where your money is being spent and how you can save more of it. Without this knowledge, you're just standing still. With our regular, easy to understand reports, you'll see where you stand financially – perhaps for the first time!

INSIGHT TO GROW YOUR WEALTH

Our logical financial reports also give you more information about your cashflow than you ever had before. This helps you develop a clear vision for growing wealth and securing your family's future.

SURPRISING SAVINGS

We can help you save more of your hard-earned cash than you might think. Our transparent service highlights where you can make significant savings on insurances, utilities and other common expenses.

HOW IT WORKS

Your Personal CFO is your cashflow management partner. Based on your identified goals, we help you develop a budget, pay your bills and give you easy-to-understand reports on your financial position. Everything you need to start growing your wealth!

We take the time to understand and meet your specific needs by:

- preparing your budget
- reviewing your cashflow
- paying your bills
- managing your financial documents
- reconciling your bank statements
- optimising your supplier arrangements
- giving you both detailed and 'snapshot' expense reports.

You may need all or just a few of these services. That's why we have four distinct packages to accommodate a range of needs.

YOUR RIGHT PACKAGE

We have four service packages to accommodate a range of needs. The right package for you will depend upon the complexity of your situation. Talk to us today and find out which package is perfect for you.

Inclusions	Platinum	Gold	Silver	Essentials
Budget development	Assisted	Assisted	Assisted	Self-serve
Document management	Yes	Yes	Yes	Yes
Bill review	Yes	Yes	Yes	Self-serve
Bill payment	Weekly	Fortnightly	Monthly	Self-serve
Supplier optimisation	Access	Access	Access	No
Bank statement reconciliation	Yes	Yes	Yes	No
Expense/tax management reports	Yes	Yes	Yes	Yes
Cashflow reporting	Yes	Yes	Yes	Yes
Balance sheet reporting	Yes	No	No	No

Managing your money better is easy with Your Personal CFO.

YOUR OWN PERSONAL CONCIERGE

You'll be assigned your own personal Concierge to help get your personal finances on track – and stay on track. They are your trusted partner, available to answer questions and guide you every step of the way.



Spend more time doing what you enjoy