An investment in your happiness

TruWealth
Your Personal CFO

We're financial specialists for smart professionals

Intelligent, educated people like you know when it comes to managing your money, there's no room for error.

You need to get it right; your happiness depends on it.

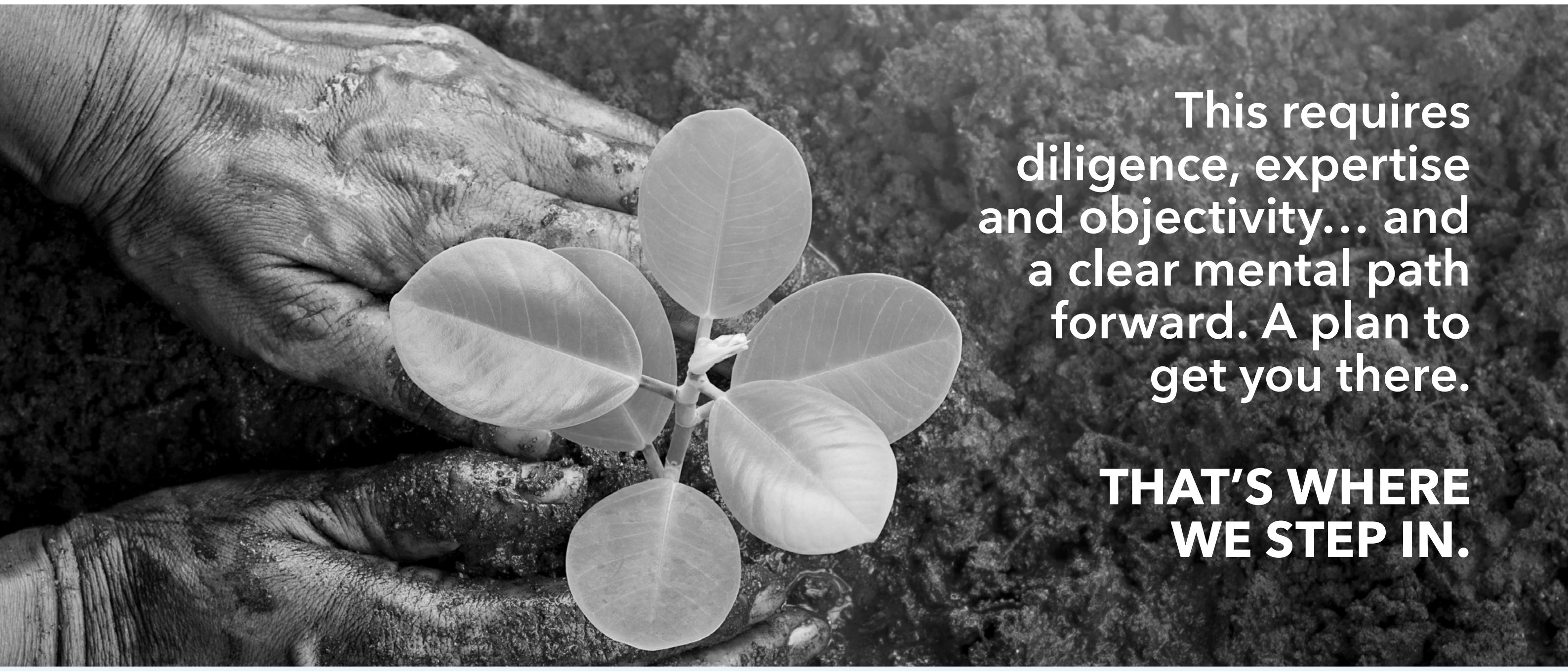
We understand the importance of having your money serve you and your family's needs. It's a 'means' to having and living a happier life.

We totally understand what you need:

Confidence
to make informed decisions

Freedom
to do and have what's important

Control
over the things in your power to control



This requires diligence, expertise and objectivity… and a clear mental path forward. A plan to get you there.

THAT'S WHERE WE STEP IN.

Your own personal CFO

As your personal Chief Financial Officer (CFO), our role is to apply critical thinking and financial acumen to your situation.

To provide a methodical approach to make the most of what you've got. To bring expertise from multiple sources and meticulous research to your table.

Someone to:

1. Crunch the numbers and show you what is possible.
2. Translate technical jargon into relevant decision-making data.
3. Help you choose wisely and avoid unnecessary mistakes.
4. Uncover the things you don't know, something different, something better.
5. Keep your financial affairs in order whilst maintaining the integrity of what matters in your life.

Our process revolves around you.

Financial Planning, like engineering or consulting, is about designing and building things to solve problems – in this case, it's financial ones. YOURS

We do it by following an iterative series of steps that produce financial outcomes based on criteria dictated by what you want from your life.

With as much or as little involvement as you like, we:

» Match your life aspirations with the financial resources required.
» Use a methodical approach to help you make decisions that consider trade-offs and ramifications.
» Provide ongoing evaluation and make modifications and improvements as your life unfolds.

This process is flexible and cyclical.

Over and over we come full circle, offering ad-vice and support every step of the way.

Just so you know, your first appointment is at our cost.

YOU

Your Life
Your Happiness

TruWealth

» Financial Advice and Analysis
» Modelling and projections
» Evaluation and assessment
» Portfolio management

External support

Research
» Leading Research houses
» Covering all asset classes
» Portfolio construction and analysis

Technical expertise
» Professional Education
» Legislation
» Regulatory
» Compliance and professional standards

Other experts / specialists
» Lawyers
» Accountants
» Bankers
» Brokers
» Business Advisers

Financial Product and Support providers
» Licensee support
» Investment product providers
» Insurance companies
» Lenders
» Banks and Admin platforms
» Software and Technology providers

Working together to make it happen.

At TruWealth, we help you to create a clearly defined set of priorities, enabling you to make decisions that fundamentally and measurably improve your financial life.

Supercharge your savings | Investment Planning

We'll devise a disciplined investment plan that considers all options so your money works harder without taking unnecessary risk.

Protect what you value | Insurance

Making sure your health, family and income are adequately protected when things don't go to plan.

Retire on your terms | Retirement & Superannuation

Guide you to increase your superannuation benefits so your retirement savings last as long as possible.

Make debt work for you | Debt Management

We'll show you how to take advantage of borrowed money and use it to improve your overall position.

Affording bricks and mortar | Mortgage Solutions

By making smart calculated decisions around the right structure and banking solution, we can potentially save you thousands of dollars and take years off your mortgage.

Leave your legacy | Estate Planning

We capture your wishes to ensure your legacy and estate go to the people you choose when your time has come.

Managing your Money | Budgeting

We help you balance the need to plan for the future, without sacrificing all the good things in life today.

Protecting your assets | Structure and asset ownership

We make sure everything you own is structured in the most tax-effective way and is protected from unforeseen risk.

Caring for your ageing parents | Aged Care

Provide you with options when it comes to making sensitive decisions about caring for your ageing parents.

Government support | Centrelink

Making sure you get access to all the Government entitlements you deserve.

Pay less tax, legally | Tax Planning

Minimise the amount of tax you legally have to pay so you can keep more money in your pocket.

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