NAVWEALTH
destination on purpose

PLAN YOUR FUTURE...
WEALTH & ACCUMULATION

"Navwealth clients are 'living life on purpose', confident that their actions are having a significant and positive impact on their financial future." – Craig Banning, Navwealth

WHAT'S IT ALL ABOUT?

Financial planning and advice is not just for the wealthy. Wealth advice can help you overcome major financial hurdles and most importantly ensure you are maximising the opportunity to create wealth and reach your financial and lifestyle goals.

WHY

We know that you work hard for the money you earn and want the best possible life for you and your family. To achieve this, you need to ensure that the money you have also works hard for you. A financial plan based on your specific circumstances, goals and dreams can ensure you minimise any financial pressures and that you improve your overall lifestyle now and into the future.

Do you know:

- **Where to invest?**
- **How to manage your cashflow effectively?**
- **How to protect your assets?**
- **What the most tax-effective investments are?**
- **Whether your debts are structured properly?**
- **What your financial goals are and whether they match your partner's?**

Most Trusted Adviser

We invite you to share your Navwealth experience with us: please contact admin@navwealth.com.au

Contact us

(02) 9008 3000
admin@navwealth.com.au

Level 1, 154 Pacific Highway,
St Leonards NSW 2065

www.navwealth.com.au

"'Navwealth's strength is understanding the needs of the client and working together for a solution" – Steve Helmich, Navwealth Client

WHO'S IT FOR

Everyone can benefit from wealth advice. Regardless of your income, age, current assets, savings or superannuation, a review of your financial position may uncover great opportunities to maximise wealth.

Wealth Management Services

- Wealth Creation Advice
- Investment Advice
- Superannuation Planning
- Retirement Planning
- Estate Planning*
- Personal and Business Insurance
- Lending
- Share Advice & Broking*
- Self-Managed Super Fund (SMSF)
- Aged Care Planning

* These services are outsourced to our professional partners in an integrated approach with Navwealth.

THE NAVWEALTH SOLUTION

Our 'Values Based' approach creates a plan which reflects your life's goals and ensures all parties remain focused and motivated towards achieving the desired outcome. This plan encompasses your wealth creation, accumulation, debt reduction and asset protection strategies and includes a combination of our wealth management services.

You can feel comfortable that all aspects of your situation have been considered and a personalised plan has been put in place to meet your specific needs and goals. You can also enjoy the ease of having just one contact point for all of your financial needs, saving you precious time.