# Fostering Long-Term Wealth

# We help individuals and business fund a purpose-driven life.

## Purpose-driven financial planning

Include video here: Navwealth Service Overview Wealth

At Navwealth, we know that the key to a fulfilling

life or successful business is having a clear destination

in mind. As your trusted financial planners, it’s our goal

to guide you toward your goals and dreams.

To do this, our dedicated team will help you create and

accumulate wealth by building investment portfolios, and

guiding you through both debt reduction and asset protection

strategies with measured targets to track your progress.

**Take Control of Your Financial Future [Connect] BUTTON links to Contact Us Page**

## So that you can live the life you deserve

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Purpose-driven financial planning provides you with more choices and opportunities to live the life you deserve now and long into the future.

Whether that looks like retiring on your own terms or growing a business to greater heights, our integrated approach will help you navigate the inevitable twists and turns of your financial journey towards true success.

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What we offer

**Why Financial Advice? [accordion drop down]**

We understand that although it is not the only factor, money is an important foundation for achieving your goals and dreams. We also recognise that money can be a complicated burden that adds significant stress to your life. Our experienced team is dedicated to using their financial expertise to help you navigate your financial journey with intentionality and direction so that you lead a more fulfilling life.

**Investment Advice [accordion drop down]**

We know that you work hard for the money you earn and want the best possible life for you and your family. Navwealth investment advice will serve anyone looking to align their financial resources with their personal and professional goals. We can help you overcome major financial hurdles and most importantly ensure you have the opportunity to minimise financial pressure and reach your desired destination.

**Retirement Planning [accordion drop down]**

With average life expectancy rates increasing, you will now need more funds to support your lifestyle for your entire lifetime. A recent survey by Rest Super showed that only 14% of Australians are financially prepared for retirement.

At Navwealth, we don’t view retirement as an end destination. Instead, it should be the start of a new fulfilling journey. Our dedicated team will analyse your options and help you make informed decisions about your financial future. We will develop a financial roadmap to give you the best chance of meeting your present needs and keep you on the path toward a happy and successful retirement.

**Self-Managed Super [accordion drop down]**

A Self-Managed Superannuation Fund (SMSF) may be an ideal way to reach your desired destination, particularly if you are an individual or family with a superannuation balance of more than $300,000. If managed appropriately, an SMSF allows you to take greater control over your retirement savings so that you can achieve your desired destination on your terms.

With Navwealth, you do not need to be an expert investor or accountant to benefit greatly from running your own SMSF. Instead, we will partner with you and guide you toward your financial and lifestyle goals with a comprehensive SMSF solution from fund establishment to investment and contribution advice and compliance assurance.

**Personal and Business Protection [accordion drop down]**

The journey of life presents many unknowns, so every Australian should have a personal protection plan in place to protect themselves, their loved ones, their businesses and their assets. Should disaster or tragedy strike, appropriate insurance will make an enormous difference.

At Navwealth, our goal is to provide you with complete peace of mind and a backup plan. We will work with you to structure appropriate and tax-efficient insurance solutions that will get you back on the path toward your dream financial destination quickly and safely.

A purposeful life shouldn’t be left to chance, so for ultimate peace of mind and to discuss your personal protection plan, please contact the Navwealth team.

**Estate Planning [accordion drop down]**

If you pass away without preparing a will, your estate will be distributed according to a pre-determined formula, and if your only living relatives are more distant than cousins, your estate will be passed onto to the Government.

At Navwealth we want to provide you with peace of mind that your loved ones will be taken care of. That’s why we offer access to a dedicated team of specialist Estate Planning advice partners who will ensure your assets are allocated according to your wishes.

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## Your dream financial destination is not just a place – it’s a purpose

Let’s clarify your purpose and align your financial resources.

**Start Your Journey Toward Financial Freedom [Connect] BUTTON** link to Contact Page

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## Achieve Your Dream

## Financial Destination. It’s possible.

At Navwealth, we’ll help

you navigate your journey toward

financial freedom with purpose.

**Contact Us Today [BUTTON]**

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## Other ways we can help you

To better navigate your financial future.

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| * Accounting and Taxation Services * Bookkeeping Resources * Finance and Lending | * Business Advisory * Aged Care Services |

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