



## PROTECT *Your Best Life*

### Who you are:

You have built a significant amount of wealth and now want to ensure it is put to the best use for yourself and, potentially, multiple generations of your family. You want the peace of mind that comes with knowing your financial world is being stewarded by a team of professionals.



### Typical Stage of Life:

- Reflecting 50-60 Year Olds
- Self-funded Pre/Post Retirees

**Financial Assets:** \$2MM - \$10MM or  
**Household Income:** \$500,000+

### What you get:

Comprehensive Financial Plan tailored to your needs and designed to give you the best chance of achieving your objectives.

Specialised ongoing guidance on all facets of your financial life, driven by semi-annual progress meetings and a range of informal touchpoints.

**Your ongoing partnership covers:** Retirement Planning, Estate Planning, Intergenerational Wealth Transfer, Investment Management, Financial Wellbeing, Risk Management, Debt Management, Education (see next page for more detail).

Minimum Ongoing Fee: \$12,000 p.a. (Plus GST)

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### Services:



**Retirement Planning** – Specialised guidance helping you to feel confident in your ability to fund your lifestyle and objectives. This may include: sustainable spending discussions; capacity testing; optimal structuring of assets and cashflow, progress tracking; and tax planning (in conjunction with your accountant).



**Estate Planning** – Comprehensive estate planning discussions involving your solicitor and accountant to develop and implement an estate planning strategy.



**Intergenerational Wealth Transfer** – Strategic discussions around: giving your children a head start; multi-generational wealth structures; “giving while alive”; philanthropy etc. You will also be granted priority access for your children into our BUILD service offering.



**Investment Management** – Access to Strategy First’s Investment Committee and Core portfolio solution, with the option to add satellite investments where appropriate. Guidance and coaching that allows you to cut through the noise and focus on your long-term portfolio goals.



**Financial Wellbeing** – Access to Strategy First’s Financial Wellbeing programme, which will include sessions designed to uncover your personal values and track progress towards them.



**Risk Management** – As required, we will liaise with a specialist insurance adviser to achieve a portfolio of personal insurances targeted to your needs.



**Debt Management** – As required, we will liaise with a specialist debt adviser/broker to ensure your financing needs are met.



**Education** – Access to educational material and regular content created by Strategy First’s Advice Team and Investment Committee.