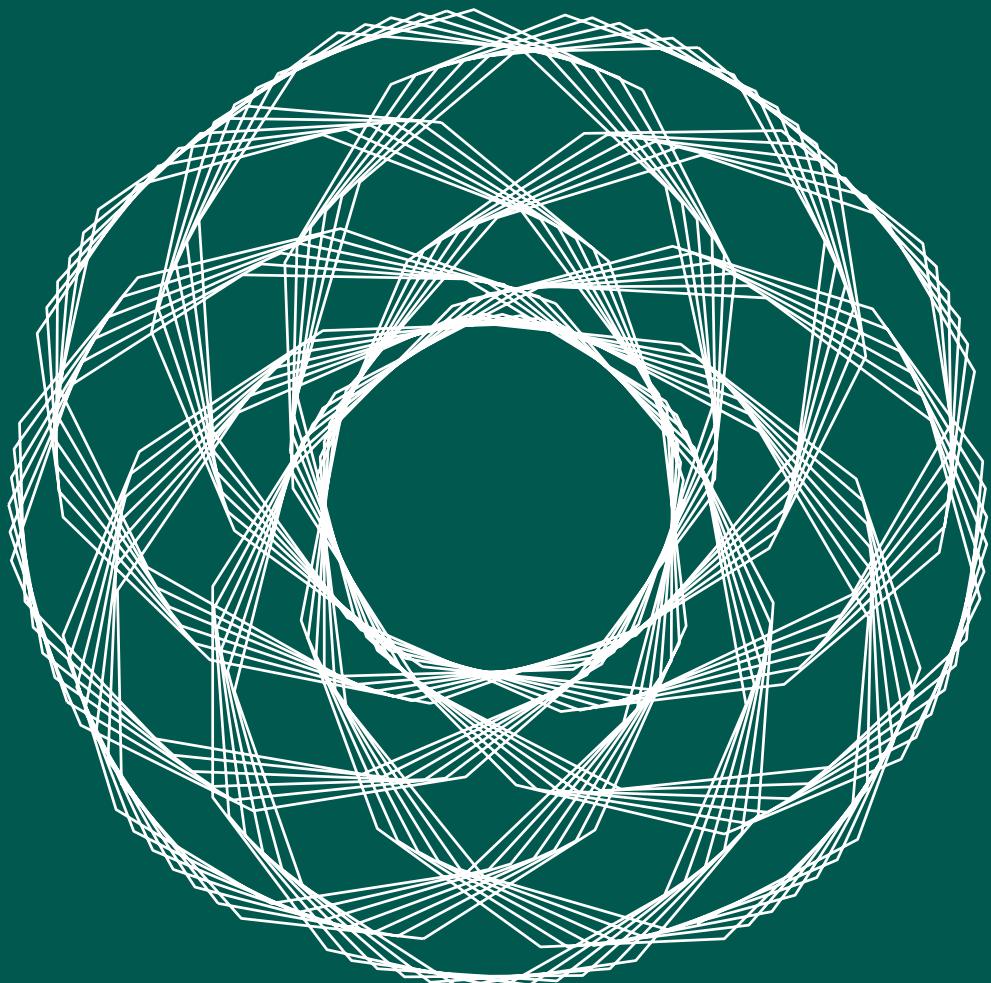




**Platinum**  
*Strategies*

## Financial Planning



Today we live in a faster, forward-thinking time. Major changes bring you more freedom and more options than ever. But with more choice comes more responsibility, and perhaps more confusion. That's where Platinum Strategies can help.

---

### **Our Philosophy**

At Platinum Strategies we are dedicated to assisting our clients to meet their short and long-term financial needs and goals, whatever they may be.

We want to help our clients have a greater understanding of the ever-expanding range of investment and superannuation options available.

We have built our practice and reputation by offering our clients bespoke tailored solutions - you won't see any off-the-shelf or 'nearly-there' packages.

If you want relevant, valuable financial advice that you can rely on, Platinum Strategies has the resources and expertise to deliver it.

### **Our Company**

Platinum Strategies philosophy maintains that excellence is not an end result, but a continuing process of providing the best possible service. To this end, we aim to ensure that the service and advice delivered to clients is nothing short of the highest quality.

Platinum Strategies owes its success and continued evolution to a professional and dedicated team of individuals.

Our financial planners have undertaken specialised training in Self Managed Super Funds. This has provided Platinum Strategies with the opportunity to expand the range of services we can offer you.

Platinum Strategies has always recognised the potential synergies between the accounting profession and the financial services sector, and we have developed strong relationships with several accounting firms.

Our knowledge and efficient management of client needs and portfolios, provide new benchmarks for service.

### **Our Services**

Financial planning is the process of meeting your life goals through the proper management of your finances. Your life goals could include buying a home, saving for your children's education, managing debt or planning for retirement. We all have financial goals, and everyone needs a strategy. That is where we as financial planners come in.

We go through a process with you that looks at the 'big picture' view of where you are financially and where you want to get to.

Using this process, we can help you work out what you need to do now, and in the future. It provides a sense of comfort and security, and gives you a plan to work towards.

## **The Six Step Financial Planning Process**

When developing a financial plan specifically for you, we use the six-step process which is endorsed by the Financial Planning Association (FPA) to help you work out where you are now, what you may need in the future and what you must do to reach your goals.

The six step process includes:

Step 1 - Defining the scope of engagement

Step 2 - Identifying your goals

Step 3 - Assessing your financial situation

Step 4 - Preparing your financial plan

Step 5 - Implementing the recommendations

Step 6 - Reviewing the plan

### **Which strategy is best for you?**

Our skilled financial planners will work closely with you to develop solutions that will give you and your family peace of mind. After our first meeting, we short-list the best alternatives, fine-tune that list and present you with the best options - for you, your family, your lifestyle and your situation.

There are several strategies that we can deliver:

- Financial Planning
  - Wealth Creation
  - Strategic Advice
  - Investment Advice
- Risk Insurance
- Salary Packaging

- Self Managed Superannuation
- Corporate Superannuation Advice
- Estate Planning
- Retirement Planning/Pension Strategies
- Portfolio Management Services

**Everyone has unique dreams, goals and aspirations. Our job is to help you achieve them.**

### **Your future starts now**

Platinum Strategies works closely with individual, private and corporate clients both locally and nationally – and we have successfully helped to align their financial future with their goals and objectives.

Developing a considered and thoughtful financial strategy is one of the best investments you can make.

### **Are you confident about your financial future?**

If you would like to know more about how Platinum Strategies can help to plan for a secure and healthy financial future, please call us. We look forward to working with you on developing a tailored solution which works for you.

**Ready to take control of your financial future and meet your goals? Contact our financial planning team today.**

Suite 6, 148 Greenhill Road  
PARKSIDE SA 5063  
Ph: (08) 8299 9877  
Fax: (08) 8357 8051  
Email: [clientservices@platinumstrategies.com.au](mailto:clientservices@platinumstrategies.com.au)

**Disclaimer**

The information (including taxation) is general in nature and may not be relevant to your individual circumstances. You should refrain from doing anything in reliance on this information without first obtaining suitable professional advice. You should obtain and consider a Product Disclosure Statement (PDS) before making any decision to acquire a product.