



## **Financial Planning & Investment Advice**

- Clients approach us with particular financial problems and also with a desire to make sure they are “on target”.

At Cachewise we offer a financial advisory service that is focused on helping you meet your goals.

If you would like to understand whether you’re set up in the most appropriate structure, making asset allocations that are suitable for your risk profile, and simply whether you will have enough money to provide the lifestyle you want in retirement, then call us and make an appointment.

Cachewise generally provides advice in the following areas, although we are able to address alternative situations on a case-by-case basis:

- Personal financial planning - strategies and documented plans including:
  - Investment strategies and investment selection
  - Wealth creation and risk protection strategies
  - Tax minimisation strategies
  - Retirement planning
  - Gearing strategies
- Investment advice and management
- Self-managed super funds (establishment, administration, compliance, investment advice and ongoing management services)
- Insurance and Risk management:
  - Life and disability insurance
  - Trauma insurance & Income protection,
  - Keyman insurance
- Estate planning and asset protection
- Ongoing strategy and portfolio review service
- General Consulting advice