

# PEOPLE PLANNING RETIREMENT

Planning Partners provides tailored advice to people planning retirement. These clients often require advice in the following areas:

## **SUPERANNUATION STRATEGIES:**

Decisions regarding superannuation contribution and investment strategies are critical in the months and years leading up to retirement. We encourage prospective clients to seek advice well before retirement to ensure that you take advantage of all tax concessions.

## **RETIREMENT INCOME STREAMS:**

Planning Partners can help you navigate complex legislation and structure tax-effective income streams to provide a comfortable retirement.

## **PORTFOLIO MANAGEMENT:**

We provide portfolio advice on a wide range of investments including direct equities, professionally-managed funds and fixed-interest investments both within and outside of the superannuation environment. We can also provide you with access to direct property investments through our strategic alliances with Buyers Advocacy and Property Management firms.

## **ESTATE PLANNING:**

We provide comprehensive advice to ensure that your assets are protected and distributed in accordance with your wishes upon death. We work in conjunction with Estate Planning solicitors who prepare Wills and Powers-of-Attorney for our clients.



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The information on this website does not take into account the objectives, financial situation or needs of any particular person. Before making an investment decision you should consult with your financial advisor and consider whether it is appropriate in light of your particular objectives, financial situation and needs.

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