

## PROFESSIONALS AND EXECUTIVES

Planning Partners provides tailored advice to professional employees and executives. These clients often require advice in the following areas:

### **CASHFLOW MANAGEMENT:**

We review your income and expenditure patterns and identify areas where cashflow may be isolated for wealth creation or debt reduction purposes.

### **WEALTH CREATION STRATEGIES:**

We devise wealth creation plans which are tailored to your particular financial goals and involve a combination of investment, debt management, tax and superannuation strategies.

### **DEBT MANAGEMENT:**

At Planning Partners we work in conjunction with independent Finance Consultants to ensure appropriate structuring of your personal and investment debt.

### **PORTFOLIO MANAGEMENT:**

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

### **EXECUTIVE SHARE AND OPTIONS PLANS:**

We provide advice on finance, taxation and investment issues associated with exercise and sale of company shares and options.

### **RISK SERVICES:**

Our in-house Insurance Specialist provides advice on a complete range of Personal Risk products to protect you and your family in the event of medical catastrophe or premature death.

### **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 legal documents including Wills, Powers-of-Attorney and Trust Deeds.



ABN 24 943 115 344

Level 1, 587 Canterbury Road  
Surrey Hills Victoria 3127  
T 03 9830 0366 F 03 9830 7028  
[www.planningpartners.com.au](http://www.planningpartners.com.au)  
[advice@planningpartners.com.au](mailto:advice@planningpartners.com.au)

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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