



PERSONALISED SERVICE CASE STUDY: Full Advice Investor Service Model

FULL ADVISORY INVESTOR SERVICE MODEL

*'I know I need advice
but I don't really
understand enough
to set my own plan
for the future and
would like someone
to actively manage
this on an ongoing
basis.'*

CLIENT STORY

Janet & John are retirees. They manage their own super fund but feel with so many changes to regulation and having to make complex investment decisions, they'd like to have their investment assets managed for them. They want to spend time enjoying their retirement instead of being tied down with investment decisions and management of assets.



CLIENT'S GOALS & PREFERENCES

As retirees, they want to enjoy their retirement to its fullest and this means they can continue to fund their retirement lifestyle. Janet & John seek the following goals:

- Their SMSF investment mix is structured to meet their income & growth needs.
- Understand the importance of looking after each other in the event of death.
- Ensure their investment assets are professionally managed to meet their retirement lifestyle needs.

'We don't need to be involved in every investment decision and would prefer trusted advisors to manage our portfolio on our behalf.'

CLIENT SOLUTIONS

After a detailed discussion with their adviser, Janet & John selected the **FULL ADVICE INVESTOR SERVICE*** model. ***DOWNLOAD FLYER**

CLIENT BENEFITS & OUTCOMES

Our 3 service options are tailored to incorporate both self-directed service alternatives & full advisory solutions to build an investment & service offering that fits your profile while still achieving your financial goals.

- Piece of mind knowing investments are professionally managed to suit retirement goals..
- SMSF Investment Strategy reviewed to align with their investor profiles.
- Connection to their accountant for seamless reporting & compliance
- Happy receiving periodic portfolio updates
- Access to people & expertise when & where needed.

**Contact your accountant or financial adviser
to discuss your financial goals & needs:**

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