Strategic Advice

High quality financial advice starts with determining your life goals and is progressed through an assessment of the financial viability of achieving those goals.

We help private clients create a plan to create wealth by making smart choices about money. We have the capability to provide real-time data on a monthly basis so that you can compare your progress against the targets set in your written plan for the achievement of your goals. Small increments in your net wealth on a monthly basis could result in massive improvements to your wealth over time.

What is Strategic Advice?

Strategic Advice is outcomes-based advice that focuses on the client's longer term objectives and the elements that work together in achieving this.

We look at the wide scope of your circumstances and may cover considerations including investment, debt, cash flow, risk protection, estate planning and retirement planning. It includes a proactive ongoing advice relationship between adviser and client in a clear and easy to understand service package.

- Strategic advice is complex because we take into account the interaction of many factors present in your financial situation. An effective plan makes use of synergy (extra effectiveness created due to the combined effect being greater than the parts) so that you may only need to make small adjustments to your lifestyle to be rewarded with the long term financial outcomes that you want. To grow your wealth requires time and effort.

- The strategic advice we provide has a strong technical and mathematical basis (modeling with specialized software) and we use well-substantiated investment philosophies. Your projections (modeling) will be done over a long-term time-frame and not just for the next couple of years.

- How do we add value? By coaching you through on-going advice we help you to stay on course for the long term. This is delivered via regular forward planning meetings.

- High quality strategic advice also takes into consideration your attitude towards risk. We incorporate the mitigation of risks which can impact on your financial plan e.g. credit risk, investment risk and the risks of unexpected events in your life, such as major medical trauma.

- Your strategic plan is tailored to your financial situation and there is no specific formula for clients even though on the surface there may be similarities in ages, incomes and financial circumstances. Our service is tailored to meet your goals and objectives and is aligned with what's important about money to you.

- Contrary to general public opinion, financial advice is not just about product selection. However, where products are required to implement your plan, research is done to ensure the products selected are suitable to your circumstances.

- Your plan has built-in flexibility and can be adjusted as changes happen. Changes may happen as a result of outside forces such as legislation, economic and market conditions or unexpected events beyond your control.

- We partner with you to help you make smart choices about money so that you can maximise the probability of achieving your financial goals. We like to have an understanding with you that it would be in your best interests to contact us when you are considering making financial decisions which are likely to impact your plan.

We have the systems, infrastructure and resources to partner with you on your financial journey and help you adjust according to the changes that happen in your life and help you achieve peace of mind.

We look forward to partnering closely with you to achieve your goals.

We are contactable by phone (**02 6188 4266**) or email info@zawealthcreation.com.au.
For client testimonials, please visit www.zawealthcreation.com.au
We are proud to be recognised in www.top10financialplanner.com.au for Canberra.

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You must decide if this information is suitable to your personal situation or seek advice.