

## Wealth Management

# ENOUGH MONEY TO ACHIEVE YOUR GOALS? SORTED, SIMPLE!

It's that question we tuck into the recesses of our mind. One we know we should address, but perhaps find too scary or just too hard to deal with now – where do you start? It doesn't need to be that way. Once you make that first contact with Burrell, we'll get you sorted to protect and grow your wealth. We will help you to get on the path to realizing your goal and looking forward to a more enjoyable and comfortable future. Sorted, simple!

### What is Wealth Management?

Wealth management isn't just for the wealthy or those approaching retirement. It's also for those that have a particular goal to reach, are providing for their family, or want to work smarter, not harder, to improve their financial position. Our clients usually fall into one of three stages of their life. Which one are you?

**Young starter.** You have just started out in your career and need help devising strategies to achieve your goals, like owning your own home. You could benefit from a budget and savings scheme. You may need to consolidate your super from various part-time jobs and you want to protect your new-found income if you can't work.

**Accumulator.** You are in the thick of your career and your family deserves financial security and independence. You want to develop a long-term savings and investment plan, establish a risk protection plan to guarantee income, build an investment portfolio to educate your kids, manage taxes, and identify the most tax effective ways to manage your super and increase take home pay.

**Consolidator and/or retiree.** You're thinking about retirement and you want enough money to last you for the rest of your lives. You want to pay off debt and optimise your retirement income. You want to review the performance of your existing investments, possibly build other assets outside your home and super, review your insurances, maximise superannuation and pension benefits, and plan your estate. You'll want your savings and investments to generate enough income to meet your expenses, and of course you'll want to minimise the tax you pay.

### So that's what we do

Burrell's Wealth Management advisors take a holistic approach to put structures and strategies in place for clients to protect and grow their wealth. In doing so, we work through a comprehensive planning process with you that takes into account your stage of life, investment objectives and needs, financial and personal circumstances, and risk profile. We simply inform you of your choices and help you make the right decisions.



**Burrell's Wealth Management team.**  
**Front Row (L to R):** Alanna Fraser, Robert Chan & Alicia Kendall. **Back Row (R to L)** Eric Harrison, Mari Ashted, Angus Traves, Shanny Lai and Chris Burrell.  
*They'll work with you to put strategies in place to protect and grow your wealth.*

Here's the list of our services:

- Financial Planning
- Stockbroking and Investing
- Wealth Creation Strategies
- Investment Structuring
- Asset Allocation
- Superannuation
- Retirement and Estate Planning
- Social Security and Veterans' Affairs
- Tax Effective Investment Advice
- Gearing Strategies
- Risk Insurance Advice

In all disciplines, we seamlessly combine advisory, administration and compliance services. We bring in other specialists from within or outside Burrell, like portfolio managers, brokers, accountants and SMSF compliance administrators, to deliver you a total solution, and we regularly work alongside our client's bankers, brokers, accountants and lawyers.

You may be looking for one-off advice, or like many of our clients who don't want to keep on top of the latest economic and legislative changes, you may enlist Burrell to continue to review the performance of your investments and super to ensure your capital is working for you. If you like, we can also take care of all the paperwork: leave the portfolio administration, tax and super compliance paperwork to us.

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### Six steps to sorted, simple wealth management

When developing a plan to secure your financial future, known as a Statement of Advice (SOA), our Wealth Management advisors follow a structured process (Figure 1) to help understand your needs and recommend the right strategy for you.



Figure 1. The Burrell Wealth Management Process.  
*Simple, collaborative and proven.*

### Why Burrell?

Why should you engage Burrell to work with you in wealth management? These are some of the benefits our clients enjoy:

- **One team working together in your best interest.** Unlike many of our competitors, Burrell is one team, not different departments with different financial structures and revenue targets who 'own' clients. This means that we freely work together across disciplines to best support you.
  - **Trustworthy.** Burrell has been in business since 1937 and collectively, our wealth management team has been at it for more than 90 years. We hold an Australian Financial Services Licence issued by ASIC, and we adhere to industry codes of conduct. Most importantly, our clients are our greatest advocates, many of whom enlist Burrell to look after their investments on their behalf, and only elect to become involved for sign off at compliance time.
  - **Nimble.** Our trading, broking, research and settlement teams are close enough that we can respond to your instruction quickly and effectively. And our inhouse stock clearing and settlements team – a rarity in Queensland stockbroking – means that we have superior control over trades to proficiently process your orders.
  - **Transparent.** You can track your real-time portfolio online via the Burrell Premium Portfolio Service (PPS). That way you'll always know what you're investing in and how your investments are performing.
  - **Simple.** We don't try to overcomplicate things. We keep meetings to a minimum and we provide simple solutions and simple answers to your questions.
  - **Value.** We will be upfront with our pricing schedule. You will find our rates are very competitive compared to other wealth management providers. Our location and efficient size and structure means we can keep our costs low. You might also find that your costs for ongoing wealth management advice and maintenance are tax deductible.
- Truly objective advice.** Unlike many financial planning businesses, Burrell is not owned by a bank or other financial institution. We also prefer to author and source independent research.

### Get started

Contact us for an obligation-free consultation. Simple.

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### General Advice Disclaimer

This document contains general information only and doesn't take into account your personal objectives, financial situation or needs. You should consider the appropriateness of the information in this document with regard to your

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objectives, situation and needs. You should obtain financial advice tailored to your circumstances. Contact us if you would like to speak to a qualified financial adviser.