



Financial Services

Tailored, investment solutions

We approach financial services as a partnership - working together to establish goals for your financial future. We support you with sound advice to ensure your financial needs are met.

Whatever your stage of life, our Financial Services team ensures your financial future is in safe hands.

Security and confidence in your financial future is crucial, yet the financial services market is often complex. A myriad of options exist so when it comes to planning your financial future, the right advice can make all the difference.

You need professional advice from someone who knows you and understands your individual requirements – someone who has knowledge of your complete financial situation and can look at your needs with insight and perspective.

At Nexia, you benefit from objective, professional advice within a holistic financial framework. Our Financial Services team has the combined intelligence and resources to assist you in assessing your financial health and selecting the right products and investments to structure a financial plan that suits your individual goals and life-stage.

We understand life changes. Regular reviews are designed to meet changing goals, personal circumstances and life-stages – as well as taking the time to communicate market conditions, investment products, tax laws and legislation changes.

All of this ensures your financial plan remains current, sound and achievable.

Our Financial Services team is committed to joining you on your financial journey. We can help you make the right choice by:

- Assessing your current financial health
- Establishing achievable financial and personal goals
- Developing a realistic, comprehensive plan to meet your financial goals
- Putting your plan into action and monitoring its progress

Our services include:

- Appropriate long term investment strategies
- Wealth accumulation plans
- Retirement planning
- Social security related advice
- Personal and corporate superannuation structures
- Life and risk insurance planning
- Estate and business succession planning
- Portfolio monitoring and review service

Carefully integrated services from within Nexia – including Taxation, Superannuation, Business Advisory and Audit – ensures we are confident in looking after the big picture of your business.

For more information about planning your financial future, please contact a member of our team.

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