HUON

FINANCIAL SERVICES

Business Profile

Our Mission

planning for your future … today!

We achieve this by:

- providing a comprehensive range of financial planning services with the highest level of professionalism, integrity and respect.
- focusing on helping you to achieve your financial and lifestyle objectives in a very reliable and secure way.
- always putting your interests ahead of everything else as it is important to us that you can trust in our advice.

We work closely with:

- people from a range of backgrounds including business owners, executives, professionals and individuals to gain a thorough understanding of what is important to them
- other professional advisers, in particular your accountant, to develop and implement tailored solutions designed to achieve your objectives.

We understand that:

- you lead a busy life so our objective is to ensure that while you are focussed on your business or career success or on enjoying your retirement lifestyle, your strategies and investments are professionally managed so you are in a position to benefit from your success and to enjoy your lifestyle.

We are committed to:

- building strong, personal and long term relationships to help you accumulate and maintain your wealth.
- providing excellent client service and ongoing professional advice to ensure that your personal financial plan remains a "living document" that will take into account changes in your position or objectives over time.

As an authorised representative of the Lonsdale Financial Group Ltd we are able to:

- access specialist investment research and portfolio construction research and advice through Lonsec
- utilise the extensive technical resources of the Zurich Group to develop and apply leading technical strategies on your behalf
- undertake ongoing professional development to assist us in the provision of proactive advice
- access leading personal risk management products & research to protect your financial position
- benefit from Lonsdale's legal and compliance services and practice management support allowing us to focus our time and attention on meeting the needs of our clients

We offer a broad range of financial planning services including:

- wealth accumulation strategies
- redundancy and job change advice
- pre-retirement and retirement planning strategies
- Centrelink advice & assistance
- superannuation, including self-managed superannuation fund advice
- investment strategies, including portfolio construction and direct share advice
- risk management strategies
- estate planning strategies

Prior to meeting with one of our financial advisers we ask you to consider:

- your important lifestyle objectives including any capital expenses that you may have planned
- your ability to fund savings to help achieve your lifestyle objectives
- your retirement objectives – at what age you want to retire (if you are not already retired) and how much income you need to enjoy your retirement lifestyle
- your wishes in the event of your death or serious illness or injury

If you would like to know more about Huon Financial Services please contact us:

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