

Your future counts

YOUR WEALTH JOURNEY

YOUNG & SINGLE

- Goal Setting
- First job, managing income
- Protecting your income and assets
- Lifestyle expenses, education, travel
- Paying rent, or saving for first home
- Planning for future savings
- First investments, savings plan



IN A RELATIONSHIP

- Goal Setting
- Sustaining long term investment and superannuation/SMSFs
- Starting a family
- Buying a home
- Protecting your income and assets
- Buying a car
- Lifestyle expenses
- Estate planning



RELATIONSHIP/ WITH YOUNG CHILDREN

- Goal Setting
- Planning and strategies for superannuation/SMSFs
- Children's education
- Finance – mortgage, car, renovations
- Investment strategies
- Government allowances
- Retirement goals
- Estate planning
- Protecting your family



RELATIONSHIP/ WITH ADULT CHILDREN

- Goal Setting
- Superannuation strategies/SMSFs
- Retirement strategies
- Pay off the mortgage and contribute to superannuation
- Protecting your income and assets
- Investment strategies
- Retirement goals
- Top retirement mistakes
- Estate planning
- Transition to retirement



RETIRED

- Goal Setting
- Superannuation and pensions
- Reverse mortgages
- Estate planning
- Centrelink
- Upgrading the car
- Aged care planning
- Protecting your income and assets
- Downsizing home



L I F E S T A G E >>



BUSINESS OWNERS

- Superannuation opportunities/SMSFs
- Employee benefits
- Business insurance
- Business loans*
- Equipment finance & leasing*
- Succession planning and managing business risk

*Lending services are provided by Finconnect (Australia) Pty Ltd, ABN 45 122 896 477, a wholly owned subsidiary of Count Financial Limited.

This document has been prepared by Count Financial Limited ABN 19 001 974 625, AFSL 227232, (Count) a wholly-owned, non-guaranteed subsidiary of Commonwealth Bank of Australia ABN 48 123 123 124. 'Count' and Count Wealth Accountants® are trading names of Count. Count advisers are authorised representatives of Count. Count is a Professional Partner of the Financial Planning Association of Australia Limited. Information in this document is based on current regulatory requirements and laws, which may be subject to change. While care has been taken in the preparation of this document, no liability is accepted by Count, its related entities, agents and employees for any loss arising from reliance on this document.