

MAP



FINANCIAL
PLANNING

MAP Financial Planning

What is Financial Planning?

Financial planning is an ongoing process, which helps you to:

- Establish your key financial goals,
- Achieve them by making optimal use of your current financial resources.

The Financial Planner's role is to:

- Provide personal advice, considering a person's objectives, financial situation and needs.
- Make the client their first responsibility when preparing advice

What is Good Advice?

Good advice:

- Is provided in clear and understandable terms
- Is explained verbally and in writing (through a Statement of Advice)
- Includes strategies and solutions not otherwise known to the client
- Takes account of personal needs and goals
- Puts the client's needs first
- Clearly identifies costs which are openly discussed and explained
- Explains conflicts of interest which may influence the planner's recommendations

What can the MAP Financial Planning Team do for me?

The best way to master your financial affairs is to seek the advice of a professionally qualified planner.

Your MAP Financial Planner can work through each stage of the planning process with you, and help you manage the trade-off between satisfying your current needs while ensuring that your long-term financial goals are met.

A MAP Financial Planner can assist with:

- Savings and wealth creation strategies
- Investment selection including managed funds and direct Australian shares
- Retirement planning and income streams
- Investment gearing
- Risk insurances (life, TPD, trauma and income protection)
- Tax effective strategies including salary packaging
- Centrelink entitlements
- Aged care advice

Through our professional partners we can also refer you for Taxation and Estate planning advice.

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Who can give advice¹?

MAP Financial Planners have extensive experience working with health professionals in managing their income and investments.

They meet the knowledge and skill requirements set by ASIC and the Financial Planning Association of Australia, and comply with the FPA's Code of Professional Practice.

What will it cost?

Your initial consultation with a MAP Financial Planner is at our expense.

At your initial meeting a MAP Financial Planner will provide you with a Financial Services Guide, which sets out the fees you are likely to pay for their advice. Your MAP Financial Planner will provide a quote before you decide to proceed with personal advice.

MAP Financial Planners are paid a salary, removing commission-based incentives offered to many other Financial Planners to recommend particular products.

How do I start?

Contact MAP Financial Planning on 07 3838 1237 or 1800 640 055 to make an appointment.

www.mapfinplan.com.au

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