



Every day, something happens to all of us. Life.

Some of these things are planned, some are problems. Some things we take in our stride, others stop us in our tracks.

Your clients, like ours, need help through many life events and to manage their life's priorities.

Whilst certain life events should be triggers to seek professional advice, clients are not always aware they can, or should, do so.

Our financial advice practice is focussing on providing targeted financial advice around common life events. Clients going through life experiences such as divorce, starting a family, receiving an inheritance or the loss of a loved one, transitioning ageing parents into care, or managing a change in career can all benefit from the services we collectively offer.

The complimentary skill sets of our companies can be harnessed to provide holistic advice for these types of events. By working together when life 'happens' to our clients, we strengthen our business offerings and provide a holistic approach to the people whom we advise.

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Life events advice areas

Solicitors

Estate planning
Wills
Powers of attorney
Bequests
Binding nominations
Successor arrangements
Asset management
Contract agreements

Accountants

Budgeting
Tax management
Debt management
Salary packaging
Payment plans
Business planning
Structures (trusts, companies etc)

Financial advisers

Income requirements
Superannuation
Insurances
Investments
Tax considerations
Redundancy entitlements
Centrelink entitlements
Aged care options
Retirement funding

We would be happy to discuss ways in which we can work together as referral partners to meet your clients' needs. Don't hesitate to contact our office if you would like further information.



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Charter Financial Planning Limited is
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