Individual Client Seminars

These take the form of Information sessions on various relevant subjects including:

- Tax effective strategies (includes discussion on dollar cost averaging, gearing and superannuation).
- Retirement planning (includes guidance on calculating how much you need and how do you get there).
- Investment Strategies (a comprehensive look at the broader investment options and their respective volatility and historical returns).
- Investment of Superannuation and Redundancy payments (An explanation of how the various payout components are taxed if cashed out, rolled over or taken as pension streams. This includes strategies to deal with Reasonable Benefit Limit (RBL) problems and excess benefits tax. Case studies and examples are also provided on prudent strategies).
- Investment of Retirement Finances – Strategies for the investment of retirement capital and the implications for tax and centre link benefits.