



SCACCOUNTING



## SMSF AND FINANCIAL ADVISORY

You have worked hard to reach your career goals and foster your business achievements. However, there comes a time when it is important to accumulate wealth outside of your business. Through SC Wealth Creation we support your desire to build your wealth independently of your business or employment circumstances.

At SC Accounting, we have the expertise to make this happen. We understand your wealth accumulation needs and, working with you, we can tailor an individually structured investment plan to suit your circumstances. We commence all financial advisory engagements by understanding where you are today and where you want to be in the future. How to get there is our job!

Wealth creation is about planning what you have today and making it grow for your enjoyment tomorrow. We consider your capacity to save, by setting and reviewing cash flow targets, maximizing taxation benefits such as the use of gearing, concessional super contributions and by sensible investment choices over time. We build these wealth creation solutions to help you achieve your financial goals and objectives. The key to reaching retirement with peace of mind, is to have a comprehensive strategy that grows and changes as you do.

### **SC Wealth Creation we can:**

- Prepare an Investment Strategy and Financial Plan to suit your personal needs – including an assessment of your investment risk appetite and Strategic Asset Allocations;
- Guide you through your superannuation choices – including whether an SMSF is right for you;

contact us

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- Assist with all SMSF advisory services such as Investment Strategy, Re-Contributions, Recommend Concessional and Non Concessional Superannuation Contributions, start an Account Based Pension or Transition to Retirement Income Stream (TRIS) and Borrowings within Super (LRBA)
- Assist with your personal insurance requirements
- Assist with your Estate Planning needs – review of wills, POA and Binding Death Benefit Nominations (BDBN), testamentary trusts
- Periodic Review of your Investment, Cash Flow and Business Performance

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