

Rosenfeld Kant can help you with more than tax to give you peace of mind.



The value of sound wealth advice

Peace of mind, control, achievement, satisfaction, support, guidance...

If these sound good to you, please read on. Wealth advice is about giving you support and guidance on the best way to manage your finances to help achieve your goals and dreams. This can include advice on investing, managing debt, retirement planning or protecting your family in case something happens to you.

The right advice from the right people can help you achieve your goals, whatever they may be.

Achieving your financial goals is of course, the central aim of the wealth advice process. However, research undertaken by Rosenfeld Kant Wealth Advisors has found that clients often mention 'a feeling of control', 'a sense of relief' and 'confidence in achieving my goals' as additional benefits of good advice.

The importance of these benefits, while less tangible, shouldn't be underestimated.

In fact, research by the Investment and Financial Services Association (IFSA) found that clients with a current financial adviser are:

- Twice as confident they will achieve their financial goals
- More than twice as likely to feel they have control over their finances
- Almost twice as likely to believe they will realise their retirement dreams

As a part of the Rosenfeld Kant Wealth Advisors network, your advisor has access to the strength and resources of Rosenfeld Kant Wealth Advisors' high quality investment and economic research, risk insurance and financial strategists, along with leading edge software to help you establish and manage your investment portfolio. The end result is a powerful team working to build and enhance your wealth.

(Source: TNS Research commissioned by IFSA, 'From Passive to Active: Growing confidence in investment' December 2006)

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What to expect from our team

Step 1.
We listen

We aim to be your trusted advisor, to offer you a sounding board for your ideas, to challenge you to achieve your goals, to support you through difficult times, and to celebrate success with you.

A holistic and strategic view of your wealth and financial situation.

We go past the surface level of advice to ensure that we deliver value. Advice is not a once off, we formulate the strategy, we design and implement a plan and we provide ongoing care.

Step 2.
We plan

Implementation can include anything from reorganising loans, arranging insurances, buying investments, and managing capital gains.

- ✓ Protecting you and your loved ones
- ✓ Tailoring a solution to your Life stage
- ✓ Utilising our many years of experience to tailor a plan that works for you and your family

Step 3.

You relax

Our team of financial experts take ongoing care of your portfolio. Our tools make it easy for you to monitor and manage your accounts with our advice.

We care about your financial wellbeing and we will work for you in improving your quality of life.

- ✓ Protecting and growing your wealth with control, care and certainty
- ✓ Guidance and support
- ✓ Easing the financial stress

About Rosenfeld Kant Wealth Advisors

Rosenfeld Kant Wealth Advisors are not tied to any bank or financial institution and are not beholden to any product or asset class.

Tony Bates heads our experienced team of advisors. He has over 25 years experience in advising private clients and not for profit organisations. Tony has held senior advisory positions within leading stockbrokers, fund managers, banking, and accounting firms, including Ord Minnett, Macquarie Bank and Deloitte.

He is a member of the Financial Planning Association, SMSF Professionals Association and the Responsible Investment Association.



Rosenfeld Kant Wealth Advisors:

- ✔ Are a safe pair of hands, who care about your future
- ✔ Are open, honest and competent
- ✔ Take a holistic and strategic view of your wealth

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The information (including taxation) contained within this document is of a general nature only and neither represents nor is intended to be personal advice on any particular matter. Rosenfeld Kant Wealth Advisors strongly suggests that no person should act specifically on the basis of the information in this document, but should obtain appropriate professional advice based on their own personal circumstances.

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