

# WEALTH



## Our Services

We are an accounting, taxation, business advisory and financial services firm.

We develop and implement growth strategies for our clients by adopting a holistic view of their business and by bringing together our expertise and timely advice in the complex fields of:

- Accounting
- Taxation
- Business Advisory
- Wealth Management
- Finance
- Self Managed Super Funds

We also offer complete business solutions in other areas such as audit, by linking closely with independent industry experts who we know and trust.

## McCORMACK REYNOLDS WEALTH MANAGEMENT

**IN THIS COMPLEX FINANCIAL WORLD, McCORMACK REYNOLDS WEALTH MANAGEMENT CAN DEVELOP STRATEGIES WITH YOU TO ACHIEVE OUTCOMES FOR YOU, AND YOUR FAMILY, TO BUILD WEALTH, ACHIEVE FINANCIAL SECURITY AND ENJOY LIFE.**

We specialise in providing you with the highest quality advice based on your current life situation, financial issues and the goals you wish to achieve.

Our approach is based upon working closely with you on a thorough evaluation of your financial circumstances to determine your financial issues and goals. Our considered advice will then provide strategies on how to resolve any issue and achieve the desired outcomes for your goals.

At McCormack Reynolds Wealth Management we do not view financial planning as a process, but rather a journey through each life stage identifying and overcoming any financial issue you may encounter.

Through each of these life stages our work is detailed and thorough, providing you with a service level of the highest quality.

The process we undertake on your behalf is detailed and thorough:

**1. Getting to Know You**  
In the initial stages we want to get to know who you are and what you want to achieve for you and your family

**2. We can then:**

- Gather financial information
- Identify financial issues and risks
- Identify financial and lifestyle goals
- Clearly state our commitment to you
- Provide clear and transparent costings.

## McCORMACK REYNOLDS WEALTH MANAGEMENT



### 3.

Prepare and Present the Statement of Advice  
**The Statement of Advice (SOA) is the formal documentation that lists the recommendations based on information we gather from the 'Getting to Know You' stage.**

#### The SOA is your 'Financial Plan' and includes:

- Complete analysis and research using all resources available to develop the most appropriate recommendations
- Projections based on the recommendations to show how your goals will be achieved
- All compliance requirements and transparent fee structure based on your individual needs.

### 4.

The recommendations within the SOA are presented to you by our specialists who use everyday language.

- Together we address concerns to ensure that you are confident that the recommendations will lead you to achieve your financial goals.

### 5.

Implementing the Statement of Advice  
**Once we have agreed, we will implement the recommendations in the SOA.**

#### This will include:

- Implementing all investments
- Commencing or restructuring investment and insurance products
- Liaising with other professionals, such as accountants and solicitors
- Completing and following up all applications and paperwork
- Ensuring the implementation schedule is completed.

### 6.

Review and Update Your Financial Plan  
**A clear process is put in place to review your financial plan at regular intervals:**

- Update the plan as personal circumstances change
- Update the plan as changes in legislation may affect you
- Review the appropriateness and performance of your investments
- Ensure your short, medium and long term goals are on schedule to be achieved
- Ensure that the plan in place will achieve your financial and lifestyle goals.

**Clients can also request advice in specific areas. Advice and strategy for clients are available in the following service areas:**

- Wealth accumulation
- Personal and business insurances
- Business succession planning
- Superannuation and Retirement planning
- Self Managed Super Funds advice and strategies
- Estate planning
- Investing
- Pension / Income stream strategies and advice
- Aged care planning.

We understand that everyone is different and unique so there is no 'one size fits all' solution.

Our strength lies in developing a truly unique and personalised financial plan for you. Our thorough on-going review process will ensure that you will always remain confident in achieving your financial and lifestyle goals.

McCormack Reynolds Wealth Management will be there 'with you every step of the way'.

**If you have any questions please do not hesitate to speak to your accountant or contact Matthew Milosevic on 8161 1000.**

McCormack  
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