

FINANCIAL PLANNING

WITH YOU EVERY
STEP OF THE WAY



PHONE: 1300 363 866

McConachie Stedman

FREEDOM TO CHOOSE

Whether you're just starting out in life or planning for retirement, financial planning can put you on the right track to achieving your goals. We work with you to integrate your financial and lifestyle goals into a single strategy that will create more freedom of choice. As a result, your tailored plan is designed to help you achieve financial success without compromising your lifestyle, so you can get on with enjoying all that life has to offer.

OUR FINANCIAL PLANNERS



Steve Kirkman, Director

Overseeing our financial planning division, Steve specialises in working with clients who are retiring or have recently retired. With over 20 years experience in the financial planning industry, Steve helps equip clients with the tools they need to make informed decisions and to assist them in achieving their financial goals.



Robert Franklin, Senior Financial Planner

With over a decade of experience in the financial planning industry, Robert enjoys helping clients achieve financial success without compromising their lifestyle goals. With a wealth of knowledge, Robert provides specialised advice in aged care, life insurance, investment portfolios, retirement planning and superannuation including self-managed superannuation funds.



Kent Paroz, Senior Financial Planner

Kent has worked in the financial services industry for the past 15 years and specialises in pre-retirement and retirement planning, as well as wealth creation, superannuation and risk management strategies. He enjoys helping clients make the right financial decisions and prides himself on building long term relationships with his clients.



Jerry Reading, Financial Planner

Jerry is an accredited financial planner and works alongside clients to reach their financial goals. With his extensive knowledge in financial planning, Jerry provides specialised advice in life insurance, investment portfolios, retirement planning and shares, as well as superannuation.

HOW WE HELP

Our team of experienced financial planners are dedicated to assisting you to grow and protect your wealth. We understand that your needs vary depending on what is happening in your life and we work with you every step of the way, helping you to understand how to make your money work for you. We help you integrate your financial and lifestyle goals into one streamlined strategy so you can achieve financial success without compromising your lifestyle.



WEALTH CREATION

No matter where you are, we can help build your financial security through successful individual wealth creation plans.



INSURANCE PROTECTION

Although we don't like to think about it, if something happens that puts your income at risk we can keep you safe from the unexpected and help you through the difficult times with the right protection.



RETIREMENT PLANNING

To achieve the lifestyle you want in retirement we work with you to outline the best options for you and help you easily navigate through the complex retirement legislation.



AGED CARE ADVICE

Growing older means there are times you may find it difficult to manage day-to-day living activities. We help you and your family understand your aged care options to result in the best outcome for your circumstances.

WANT TO KNOW MORE?

Wherever you are in your life, we have the experience to help you make the most of what you have. Talk to us today about how we can help you achieve your financial goals.



| CONTACT US

Phone: 1300 363 866

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