



We helped Garth build a solid financial future

They say it can be hard to make money, what they don't tell you, is that it can even be harder to manage it after you have made it.

After selling the business and while working through the beloved handover period, I was faced with 'what now?'. My life was going to change and I needed to adapt. Firstly I needed to get my finances in-hand as I took the metamorphous from businessman to ... (still thinking about this one). One thing was clear, I had to simplify my life. Now this is not easy for a control freak who probably didn't have the right personal financial structure in place when he should of. So I was in definite need of educated help.

Through my accountant I was introduced to Macarthur Financial Planning, Hillross, or more personally, Peter Nonnenmacher. After a brief telephone conversation, Peter set about assisting me in sorting through and setting up a solid financial structure to carry my wife, kids and I soundly into the future. Now this was not an easy task for Peter, as I was quite protective of my assets (did I mention I am a control freak) Throughout this time Peter showed great personal service as he accommodated my work schedule, quite often meeting at our house after hours.

Once the information was gathered Peter provided us a full financial plan, which he explained thoroughly. This plan accommodated all facets of our finances, including; Investments in cash, shares, property and also included setting up a Self Managed Super Fund. This was supported by Peter facilitating an update to all insurances to ensure the right protections were in place going forward. All investments were placed under a web portal application that is easy to access and even easier to understand how your investments are performing. The icing on the cake was the consolidated yearly Tax report, taking the majority of the hard leg work out of this process.

Now that all the services have been bedded down I am extremely pleased with, the service and support continued by Peter and his team, the ease of accessing my information and ultimately how the investments are performing. Peter also provides a great environment for networking and learning through his companies organised events or invites to Financial Seminar's, this just completes the circle of the services.

The end product is that Peter and his team achieved the goal of simplifying my life, and providing a solid financial structure to support my family and I into the future. I would personally recommend the services of Peter and his team to all and sundry.

Garth Young

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WHAT'S YOUR
IDEA OF
FINANCIAL
FREEDOM?