Calibre Second Opinion Service

For successful individuals and families who want to make smart financial decisions about their money, so they get a better return on their life.

CALIBRE PRIVATE WEALTH ADVISERS

Financial Leadership and Peace of Mind for Successful Professionals and their Families.

As a successful professional or business owner, you've worked hard to build your wealth. But you also understand that your finances aren't just about money. They're also about reaching the goals and dreams you and your family hold dear.

In our experience, many successful people are not as confident as they should be about their financial future. You may be in a relatively complex situation, think you may have a specific need for advice or just feel unhappy with the advice you may currently be receiving – it's not uncommon in today's marketplace.

Here are a few questions to ask yourself:

- Are you managing your money in a way that is improving your life?

- Are you confident about your family's financial future?

- Are you financially prepared for life's big transitions?

If the answer to any of these questions is anything less than a resounding YES, then maybe it's time to get a complimentary second opinion.

Working with a team that redefines wealth management

When you hear the term "financial adviser," what comes to mind?

If you're like most people, you immediately think of someone who helps you invest your money. And it's true that most financial advisers are investment focused, whilst often ignoring other critical areas of financial concern.

Calibre Private Wealth Advisers is different – we have a more comprehensive vision of wealth management. We will help you align all your financial decisions and investment behaviour with your most important goals and deeply held values so you can use the money you have to get the best possible *Return on Life*.

We use a single, all-encompassing formula to summarise our more comprehensive approach:

$$\boldsymbol{Wealth\ Management} = \boldsymbol{Investment\ Consulting + Advanced\ Planning + Relationship\ Management}$$

Investment Consulting

- Asset Allocation
- Portfolio Management
- Investment Research
- Risk Evaluation
- Performance Analysis
- Impact of Costs & Taxes

+

Advanced Planning

- Wealth Enhancement, including Cash Flow, Tax Minimisation & Debt Management
- Wealth Protection
- Wealth Transfer
- Charitable Giving

+

Relationship Management

- Regularly Scheduled In-Person Progress Meetings & Reports
- Team of Experts including Legal, Tax, Insurance & Investment Advisers

What you can expect from our Second Opinion Service

"The first step to improve your Return on Life intentionally is to assess where you are today. It all starts by aligning your finances with your values."

We will meet with you and take you through our unique and valuable discovery process (at our cost) to help you gain clarity on your most important goals, the values upon which they are based and your current financial reality. As part of this process we will work with you to complete a personalised **Advice Map** which will be yours to keep to guide your future money decisions.

"It's always better to prepare than repair."

At the conclusion we will provide our insights on whether you are on track to achieve your goals and if required, we may suggest specific actions or strategies you may want to consider to live your best life possible with the money you have.

Either way, you will receive significant value from this unique experience, including the completion of your Advice Map and personalised analysis of your current situation.

If you would like to take up this complimentary second opinion offer for yourself or for someone you care about, please call Calibre Private Wealth Advisers for a confidential, initial discussion with one of our advisers.

Calibre Private Wealth Advisers

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About Calibre Private Wealth Advisers

Calibre Private Wealth Advisers is a privately owned, boutique wealth management firm in Melbourne. We provide financial leadership and peace of mind for successful professionals, business owners and their families. We help align our clients' financial choices with their most important goals and their most deeply held values to give them the highest probability of living their ideal life.

We limit our practice to successful professionals and family groups for whom we can make a significant impact well above the fees we charge. This approach allows us to enjoy deeper relationships, provide higher levels of service and be more attentive to our clients' needs.