

AGED CARE



WE SUPPORT YOU AND YOUR LOVED ONES

When you or a loved one has made the decision to transition into an aged care facility, it can be a confusing and emotional period. Our advisers understand the challenges you and your family face, and can provide support and guidance to empower you to make the best choices for all involved.

We will meet with you to **discuss your goals**, to understand your plans and aspirations and guide you and your family through taking the next steps.

Our team will work with you to **understand where you are now**, define what is getting in your way and work with you to achieve a better outcome.

We can help you **discover your options** for care and **empower you** to make a more informed decision.

Once you have decided on the best available care for you or your loved one, we will **support your transition** into care. We assist you through the maze of complex legislation and simplify your journey.



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MEET OUR TEAM

Whatever your goals, BDO Private Wealth Advisers take the time to get to know you and learn about what you want to achieve. From the very first meeting we focus on what's important to you. We then tailor a plan and services specific to your needs.

Our Private Wealth team are here to help you and your loved ones. Our expert Senior Financial Advisers are supported by a dynamic team, who are all committed to ensuring you receive the very best service and advice to allow you to make informed decisions about your future.



MANDY MELLOR

Senior Financial Adviser

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Mandy cares about her clients and is an expert in retirement planning. Mandy works closely with her clients to achieve an optimal financial position both in the lead up to retirement and beyond.



JAMES WAUCH

Senior Financial Adviser

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James is passionate about helping Australian families to achieve a more secure financial future. He focuses on empowering his clients to have the confidence to make more informed financial decisions and gain a stronger understanding of how to set and achieve their goals.



JOANNA MATTHEWS

Paraplanner

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Joanna works closely with our financial advisers to ensure the best possible outcome is achieved for our clients. She is responsible for ensuring we adhere to regulatory compliance standards, as well as preparing our advice documents. Joanna has a keen interest in the technical facets of financial advice and is passionate about helping people achieve their financial goals.



SHELBY RICHARDSON

Client Services Officer

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Shelby is responsible for upholding the ongoing administration for our team. She strives to provide exceptional service to our clients, while responding to queries and completing requests.

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