

PRIVATE WEALTH



OUR PRIVATE FAMILY OFFICE SOLUTION IS DESIGNED TO ASSIST SOUTH AUSTRALIAN HIGH NET WORTH INVESTORS AND FAMILIES OF SIGNIFICANT WEALTH TO MANAGE THEIR FINANCIAL AFFAIRS, PROTECT THEIR ASSETS AND GROW THEIR CAPITAL.

OUR SERVICES HAVE BEEN DESIGNED TO MEET THE PARTICULAR REQUIREMENTS RELATING TO HIGH NET WORTH AND PRIVATE FAMILY GROUPS, ENSURING WE OFFER TAILORED AND INTEGRATED SOLUTIONS TO SUPPORT THEIR FINANCIAL NEEDS.

► Financial Planning

BDO Private Wealth can assist with all superannuation, investment, wealth accumulation, protection and pre and post retirement planning goals.

► Investment Services

Access to expertise in asset construction, investment and portfolio management. Our focus is to provide bespoke investment expertise offered only to high net worth investors, not for profit and institutional style clients.

► Family and Business Advisory

Defining and establishing a family governance framework and sourcing solutions for the family business such as business succession planning, wealth transfer and business protection.

► Philanthropic Management

Assisting our clients in charitable activities, foundations and scholarships and assessing the tax implications relating to philanthropic deeds.

► Intergenerational Wealth Management

Building solutions to protect the financial security of family members, inheritance, personal succession planning and wealth transfer.

► Estate Planning

Developing solutions to ensure estate planning requirements are complete, preserving wealth and ensuring the transfer of assets is aligned to your goals and objectives.

MORE INFORMATION



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Partner

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▶ Lending Services

Personal and commercial lending solutions co-ordinated with our own lending partner.

▶ Tax Advisory and Regulatory Compliance

Integrated consultation with specialist BDO partners assisting with tax and regulatory compliance, SMSF support and other investment or asset management.

▶ Other Services available

- HR
- Remuneration packaging
- Expatriate Advice
- Share portfolio management – trades
- Aged Care
- Real Estate Portal
- PA services
- General Insurance
- Legal Advice
- Health and Wellbeing
- Fleet Management (Car)
- Corporate Super
- Personal Banking

Please contact Tony Simmons or your BDO Adviser for more details.

“No matter what stage of life you are at, we can tailor an effective strategy and progressive plan, setting you on the path to financial success.”

MORE INFORMATION

1300 138 991

www.bdo.com.au

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DARWIN • HOBART • MELBOURNE
PERTH • SYDNEY

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