

Garry & Caroline – retired farmers & clients since 2020

Farming taught us the value of experience, and having a team of specialists, to help us capitalise on opportunities and navigate uncertainties.

We knew that retiring, and leaving the farm, was going to be a challenging transition. We were determined to find and build the right team of experts, to help us navigate the complexity and the opportunity of superannuation, build an investment portfolio capable of generating a passive income stream, which we could live on and support our family succession planning goals.

Ken Howard & Morgans have proven to be a critical part of this team. They have helped us build a successful Self-Managed Superannuation Fund (SMSF), helped our parents navigate some complex superannuation taxation questions and worked with our adult children, to help them build their own long-term investment portfolios.

Their service is personalised, professional and transparent. The high standard of information and reporting provided 24/7, on the client portal, is highly valued by us. It allows monitoring of our investments at any given time. The communication has been excellent. We have regular discussions about our investments, ideas and plans with Ken, backed up by his competent support team. We have chosen to be actively involved in our investments, and this has been a very positive part of the service. We also realise, that over time, we may wish to be less actively involved, and we are confident that the structures that we have built, with Morgans, will allow us to make this choice.

If you are seeking comprehensive & practical, investment & financial planning advice, we recommend you contact Ken Howard & his team at Morgans.

www.morgans.com.au/contact/Ken-Howard