

Wealth Management

Introduction

As you accumulate investments over time and the value of your business and superannuation grows, it becomes important to consider how to manage these assets.

Having a team of advisers who understands you, your family and how your assets operate and connect, ensures that conflicts don't arise, resources are left where they are needed, and all relationships are considered.

In addition, our advisers are licensed to provide a broad range of wealth management services. This ensures you can continue to work with the same team.

Capabilities

Our Wealth Management capabilities are as follows. Refer to our Capability Statements to see how we execute to meet your business needs.

- Estate Planning
- Family Office
- Asset Protection & Risk Management
- Share & Business Valuations
- SMSF Compliance
- Superannuation Planning
- Licensed Financial Planning via our AFSL holder

Benefits

The benefits to you are:

1. When you are ready to plan how to transition your wealth, effective estate planning will bring you peace of mind and, with the right communication, set at ease those around you.
2. Because we have worked with a number of our clients across these areas, we have the team to guide you in your decision making. Managing wealth brings to the surface a different set of considerations and our experience will be of assistance.
3. When it comes to money and family, a third-party providing arms' length advice can help ease concerns. Our professional approach to financial and wealth management services seeks to give all parties confidence in the decisions being made.
4. To operate a Family Office doesn't need billions under management. You and your family can benefit from this type of service, utilising the right technology and advisory services that our team can co-ordinate for you and help you manage. It can assist in giving you that feeling of control that, as a business owner, you are more used to.

What's next

Contact UHY to arrange a discussion about we can best assist you. Connect with us and connect to possibility.