

FINANCIAL FREEDOM CHECKLIST

IDENTIFY HOW MUCH YOU WILL NEED

What do you want to do when you retire? Identify how much you will need to live a comfortable retirement and develop a work plan to get you there.

HAVE A SAVINGS PLAN & BUDGET

One of the most important tips when generating and accumulating wealth, is the need for a disciplined savings approach. It is highly important to maximise saving opportunities in order to have sufficient funds for the implementation of any investment strategy.

BUILD AN INVESTMENT PORTFOLIO

Identify how much you would like to invest, and decide how to allocate your money. The funds you choose should be suited to your risk tolerance and years to retirement.

GROW YOUR SUPER

Building your retirement savings is one of the most tax-effective ways to create wealth. Whether your superannuation is a self-managed fund (SMSF) or an industry fund, there are many strategies available to boost your super and ensure your funds are invested in a strategic way so that you have enough money to live on when you retire.

PROTECT YOUR WEALTH

It is important to protect your family, financial security and potential hardship with personal insurance, in the event of illness, injury or death.

HAVE AN ESTATE PLAN & WILL

Ensure the wealth you have built is distributed to your beneficiaries smoothly, tax effectively and most importantly, according to your wishes.

HAVE A RETIREMENT PLAN

The earlier you start planning for your retirement, the higher chance of achieving your financial goals.



WILSON PATERAS
FINANCIAL PLANNING

Wealth means different things to us all. But whilst our visions of wealth, security and contentment may differ, one thing remains true: creating wealth demands a considered, strategic approach.

It's never too early or late to work towards your desired life goals, especially when you can rely on an experienced professional to do it for you.

Our financial experts offer proactive certified industry knowledge that will set you up for life.

**BOOK A COMPLIMENTARY
CONSULTATION WITH ONE OF
OUR FINANCIAL ADVISERS**

03 8419 9800

wilsonpateras.com.au