

Family Package



PROVIDENT

FINANCIAL SERVICES

The gift of financial independence



Putting your family first

As we live longer and leave home later, many people need to support ageing parents and adult children. Can you afford both?

Money and relationships can be complicated and whilst everyone's situation is different, you understand first hand the value and peace of mind that professional and experienced advice provides.

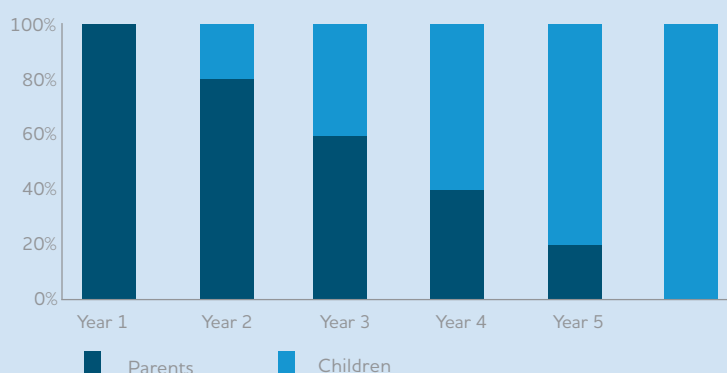
Currently, only 16% of Australians engage with a qualified financial adviser, reflecting a downward trend in recent years. However, with 41% expressing intentions to seek advice in the future, there's a clear opportunity to bridge the gap between financial needs and professional guidance.¹ Instead, the majority ask family or friends, who although may have their best interests at heart, are less than qualified to give experienced and professional financial advice.

The Family Package gives you the confidence of knowing your family are making the right financial decisions with our guidance and tailored advice.

Our family package offer allows you to:

- Receive discounted advice for family members, including aged care advice.
- Assist your children (or grandchildren) with their journey to financial independence and achieving their own goals and enjoy factor.
- Set a time frame and payment options, that suits your family, for example².

ONGOING ADVICE – PAYMENT DISTRIBUTION PLAN



According to our clients
Barry & Fiona O'Neill

"The key to our early retirement (AT THE AGE OF 55) was working with a Financial Adviser since our early 20's"

- Provident, *Enjoy Factor* book, 2013

Plan. Help. Achieve

Aged care advice

Our Family Package also provides discounted advice in relation to aged care for your family members. Moving into aged care facilities not only involves difficult and emotional decisions being made by the whole family, but significant financial costs and planning.

We can advise and support you through the decision making-process and extensive paperwork, find and negotiate with care establishments, consult with the different government departments and make estate planning recommendations.



“Provident’s management of our finances has enabled us to enjoy our passion for travelling, and as Greg explained to our son recently (who is now also using Provident); money doesn’t give you happiness, but money does give you the opportunity to do what makes you happy”
- JOHN & VICKI EVANS



To find out more about our advice and what our clients have to say about us go to

www.provident.com.au/client-testimonials



FINANCIAL SERVICES

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1. SOURCE: <https://www.finder.com.au/share-trading/financial-advice-statistics> 2. This graph does not include Initial Advice fees, which can be distributed as per your family's wishes

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