

Take control of your wealth NOW

I don't want to wait until it's too late to enjoy financial security.



Almost one in five Australians over 45 years of age, plan to retire at 70 years and older. ¹

What are you doing to look after your future self? Invest in the right expertise to build the wealth you aim for.

For most of us there is no such thing as instant wealth, however you can do something now which could create secure wealth for your future. It's called financial planning and it takes commitment, time, dedication, resources and smart planning.

Individual Focus

At **Provident Financial Services**, we don't just consider superannuation, we tailor our advice and strategies to your needs whether buying a house, investments, travelling or family planning. We provide you with expert knowledge, experience and support to help you create, manage and enjoy your wealth.

Good financial advice is worth it.

In 2023, 27% of Australians engaged with financial advisers, reflecting a growing recognition of the value of professional advice. While many still rely on friends or family for financial guidance, partnering with a qualified financial planner can lead to greater financial confidence and improved outcomes.²

No matter what stage of life you are at or what budget you have, we provide the expertise and professional discipline to implement and monitor your strategy to reach your goals and objectives.



Plan. Help. Achieve



Our vision **Plan. Help. Achieve.** is designed to help you take control of your wealth now.

Plan.

We identify your financial goals.

We assess your risk profile.

We review your cash flow and budget.

We review the structure, performance and effectiveness of your current investments.

Help.

We develop a strategy designed specifically for you with:

- The right savings plan.
- The right portfolio.
- The right investment strategy.

We determine appropriate structures in which to hold assets for tax/asset protection and control purposes. We regularly review the strategy so that it continues to fit with your changing lifestyle and objectives.

Achieve

At Provident we believe it is important to plan for your financial independence. To achieve this we focus on understanding your objectives and presenting tailored solutions to use as stepping stones that are designed to help you explore what it means to enjoy life with financial security.

“The greatest praise I can give is that the constant reviews and monitoring by the team at Provident has gone a long way to the relationship where we now feel part of the Provident family.”

- Jack & Marjorie Wragg

“The team at Provident provide us with professional and hassle-free service as they help us to manage our portfolio”

- Roy & Alma Robinson



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To find out more about our advice and what our clients have to say about us go to
www.provident.com.au/client-testimonials

¹ Australian Bureau of Statistics — “One in five plan to retire at 70 or older”.

² SOURCE: <https://www.ifa.com.au/news/33840-rebound-in-australians-seeking-advice-report>