

Financial Strategic Consultation

A Holistic Approach...

A Financial Strategic Consultation is a holistic review of your wealth creation goals, taking into account issues around tax, asset protection, estate planning, finance and structures, to assist you in meeting your objectives.



No matter how complex your finances or how ambitious your wealth aspirations are, Chan & Naylor can partner with you towards building robust wealth for life solutions. Our highly trained consultants will work closely with you to gain an in-depth understanding of your goals and give you specific advice on how to achieve them.



Who would benefit from a Financial Strategic Consultation?

At Chan & Naylor, we provide a Financial Strategic Consultation (FSC) to ensure that based on a client's current financial circumstances they will receive the most appropriate advice on property accounting, structures, asset protection & wealth planning.

This consultation with a Chan & Naylor Partner is an ideal step for:

- New Clients
- Existing Clients
- Anyone looking to refresh their portfolio



"What do I get out of a FSC?"

We:

- **Identify where you are today** from a financial aspect, in particular your debt and equity.
- **Identify any problems/opportunities** with your current investment structures.
- **Provide possible solutions.**
- **Enable you to create a detailed plan** of action for future structures for wealth creation, asset accumulation and asset protection.

During this consultation, **your specific needs and wants are assessed in line with your proposed asset accumulation or business plan.**

Any changes to existing structures or recommendation provided on new structures will include a **cost versus benefit analysis** covering cost of new structures, taxation implications, asset protection and estate planning issues.

This will allow you to be fully informed, and able to make a decision on the most appropriate course of action.



An FSC is strongly recommended if you:

- Require specific tax advice.
- Are contemplating the establishment of a Trust or Company.
- Are looking to expand your property or business investment portfolio.
- Need advice on existing structures.
- Require appropriate structures for investing.
- Require appropriate structures for business.
- Are seeking to untangle the financial mess accrued over the years.
- Want family financial security now, as well as for future generations.



"Chan & Naylor can partner with you towards building robust wealth for life solutions"

Not sure if an FSC is right for you? Why not try our Free 10 – 15 minute phone call service?

Our complimentary 10-15 minute obligation-free phone consultation with a Senior Partner service can help us evaluate your situation and gives you a no-risk opportunity to determine if a Financial Strategic Consultation can genuinely help you advance to the next step on your journey to financial freedom.

For more information please visit www.chan-naylor.com.au/fsc

To Book a Financial Strategic Consultation

Call Now 1300 250 122

Or visit www.chan-naylor.com.au/fsc

Since 1990, we've helped our clients grow and protect their wealth by leveraging our experience, expertise and innovations we've developed in wealth creation and asset protection. Through our partner's passion for property investing, we've created a wide range of innovative, tax effective and tax efficient structures to help you successfully grow and protect your wealth through real estate investing that can be safely passed down from generation to generation.

We are in the business of caring for you, your family and business from generation to generation with honesty and integrity.

