



## When to see a Financial Planner

Very few of us consider our financial long-term future and whether it will fund our lives, hopes, and dreams, although we all know we should.

No matter your age, income, experience or goals, a Suncorp Financial Planner may be able to help you increase your wealth, save on tax and secure the lifestyle you want.

If you:

- are single, married, or divorced
- have started your first job or received a promotion
- have your first mortgage or own a house
- have a family or are planning children
- need to fund the kids' education
- have sold a property or business
- have received an inheritance, redundancy or insurance payout
- are self employed
- want to retire early or are preparing for retirement

...make an appointment with a Suncorp Financial Planner today. Suncorp Financial Planners are dedicated to helping you prepare financially for life's most important milestones, so you can achieve your financial goals.



You don't need to have a lot of money to see a Financial Planner.

Your financial wellbeing is dependent on your ability to not only meet current financial challenges, but to maximise your financial situation today so you can achieve the lifestyle you want for the future.

As in life, sport, career and relationships, even finance is born from the same equation...

**goal setting + planning + commitment = success**



**Making the decision to see a Financial Planner and prepare a financial plan puts you in the driver's seat. You are deciding to pursue financial security, which ultimately provides freedom and choice.**

## How can a Financial Planner help me?

Whether you are planning for your children's education or preparing for a comfortable retirement, a Suncorp Financial Planner can guide you through the wealth creation and protection options that best suit your individual situation.

To find out how a Suncorp Financial Planner can help you, simply tick the statements below that match your current needs. Then hand the form to a staff member to arrange a no-obligation appointment\* with a Suncorp Financial Planner.

### I'd like to:

- Enjoy my retirement
- Access my equity or excess cash to generate wealth
- Protect my assets and income
- Fund my children's education
- Make my superannuation work harder
- Ensure my investment portfolio is meeting my needs
- Reduce the tax I pay
- Maximise my Centrelink entitlements

**Seeing a Financial Planner is a simple and affordable way to take the hard work out of managing your finances while still leaving you in control.**

## Why choose a Suncorp Financial Planner?

Suncorp Financial Planners have the qualifications and experience to guide you through the big financial decisions in your life. They're committed to looking after your best interests and will take the time to listen, explain things clearly and keep you informed throughout the advice process.

Suncorp is a principal member of the Financial Planning Association (FPA) in Australia. The FPA is the peak industry body representing the Financial Planning industry in Australia. Our Financial Planners are committed to the FPA's rules of conduct and ethical and professional standards.

Suncorp Financial Planners are required to undertake ongoing industry training every year in order to retain their accreditation to represent Suncorp.

You can be confident in the knowledge that Suncorp has experience in banking, insurance, financial planning and superannuation dating back to 1902. Today, Suncorp has the greatest reach of any bank into regional Queensland, and a rapidly growing presence across the country.

