Financial Planning - Corporate Advisory Services

ABH Financial Planning provides Individuals and Corporate clients with specialist Corporate Advisory Services tailored to the **SME market**. We recognise the need to assist individuals and companies, ease the burden in the areas of **Business Insurance, Commercial, lending, Car and equipment leasing**, **Corporate Superannuation Services** all in one place to save time and money.

As a client you can expect...

- ✓ A comprehensive review of your current financial situation.
- ✓ Determination of your Current Lifestyle, Goals and Needs.
- ✓ Strategies to meet your needs that are well researched
- ✓ Access to a wide range of financial products AND Companies.
- ✓ Access to the leading investment platforms in the market.
- ✓ Access to special investment & lending offerings

Corporate Services

- ✓ **Directors and Officers Insurance & other Professional Risks**
- ✓ **Corporate Superannuation Solutions**
- ✓ **Public Liability**
- ✓ **Commercial Finance**
- ✓ **Key Man insurance & Buys sell agreements**
- ✓ **Commercial Insurance**
- ✓ **Company Leasing & Lo Doc Leasing**
- ✓ **Planning for Tax Liabilities**

Corporate Benefits

- ✓ Ensure you meet you SGC Legislative requirements, plus **value add to your employees** by having a Financial Planner dedicated to building their asset and ensuring they have access to adequate Insurance protection and broader planning needs
- ✓ **Ensuring the business will have the necessary cash in place to quickly replace a key founder** or inventor in the event of serious illness or death. **This will make investors in your offering more confident that the business** is in a position to continue and grow in the case of a likely event.
- ✓ Protection for the board of Directors in the event of a law suit from shareholders resulting in something outside your control. As a director your assets can be on the line in such cases.
- ✓ Better management of your cash flow though leading tax effective lending rates and structures.

Our Client service is with a difference...

ABH Financial Planning has adapted a unique client service programme, which enables Financial Advisers to review and update financial strategies to meet all planned objectives and also to keep you fully informed and educated about your portfolio. ABH believes this approach cultivates interest and ongoing ownership of investment decisions by you.

This service includes:

- ✓ Regular access to your Financial Adviser
- ✓ An invitation to regular review meetings
- ✓ Monitoring and portfolio statements issued either annually, bi-annually or quarterly
- ✓ Educational and investment forums
- ✓ Access to specific investment offerings
- ✓ Introductions to other financial services professionals
- ✓ Explanation of analysis, options and recommended solutions
- ✓ Ongoing plan monitoring
- ✓ Asset management
- ✓ Review and changes to your plan, if and when your situation changes
- ✓ Peace of mind that you have an experienced financial professional available for all your financial decisions

The financial issues and options we are faced with get more complicated every day, it's a full time job. Get the expertise you need from an experienced financial advisory team today and get on with what you do best; building your business!

Contact us: Please call our office to make an appointment discuss your needs today!

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ABH Financial Planning

Accreditation:
Authorised Representative

Professional Investment Services Pty Ltd
Australian Financial Services Licence No. 234951 ABN: 1 074 608 558

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