

FINANCIAL SERVICES

Working with you to achieve your financial lifestyle and objectives in providing you with our personalised and ongoing advice.

The process begins with a no cost and no obligation consultation to explore where you are now, where you want to be and what roadblocks stand in your way to achieve those things.

We'll explore ways you can get ahead and achieve your financial and lifestyle goals through strategies tailored specifically to your needs.

We'll look at ways to:

- Pay off your home faster
- Reduce your tax burden
- Have money for renovations, holidays and emergencies
- Create Wealth for your long-term security.
- Achieve financial independence at retirement

We are committed to delivering the highest standards of advice and customer service and pride ourselves on our value added services. We'll work with you to achieve your financial and lifestyle objectives by providing integrated, holistic solutions to you.



Book a no cost, no obligation consultation with Nathan Watson

CFP®, BComm, CDec authorised representative of Carwardine Financial Services Pty Ltd ASFL 323462.

FINANCE BROKING

Our firm provides clients with a large range of loan products – finance for motor vehicles, plant and equipment as well as loans for homes, investment properties, commercial properties and industrial sheds. Our finance is fast and extremely competitive.

We understand that finance for equipment and motor vehicles needs to be fast, the interest rate competitive and the deal structured correctly to ensure that you are refunded the GST.

As we are also your accountants, we can guarantee that the deal will be structured for your benefit.

If you require a home loan, an investment property loan or a loan for an industrial shed, shop, business or any other purpose, we can arrange this for you from any one of the 24 different lenders from the Big 4 banks to small banks and credit unions.



We can Make It Happen

Speak to Alex Lyall about your finance requirements.

SELF MANAGED SUPERANNUATION FUNDS

We encourage clients to set up their own Self Managed Superannuation Fund.

We think it is important for you to control your own destiny.

Ask us how easy it is to set up your own SMSF. With set up costing as little as \$xxx and annual fees from only \$xxxx, there really is no reason to wait.

Call Laurie Carwardine to discuss how we can Make It Happen.

BUSINESS ADVISORY

As trusted advisors to businesses for over thirty years, we challenge you to think about your business by asking the hard questions and encouraging you to think about things from fresh perspectives.

We assist clients in all areas of their business – strategic decisions, key performance indicators, human resources, industrial relations, business expansion, systems development, cost control, marketing, business purchases, franchising, business sale and succession planning.



Schedule your time with Laurie Carwardine to maximise your profits.

TAXATION

We prepare income tax returns and provide advice in all areas of taxation including GST.

We do tax planning with clients and understand that clients want to achieve legal minimisation. Taxation implications are particularly important when you are purchasing a business or property. You need to set up the correct entity initially to minimise taxation as well as limit your legal liability. So, involve us at the start and we will – **Make It Happen.**

ACCOUNTING

Financial statements provide the base for managing your business.

We prepare all financial statements for our clients, be it monthly, quarterly, half yearly or yearly.



FOLLOW US ON INSTAGRAM

Stay up to date with the latest in finance, tips for running a business and general financial advice.

@CARWARDINES

ARE YOU LOOKING TO...

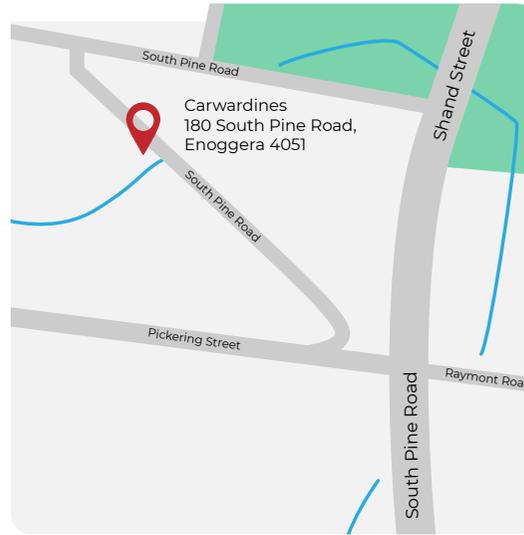
- Pay off your mortgage much sooner
- Upgrade, or renovate your home
- Budget & make your money work for you better
- Take your dream holiday
- Consolidate/review Superannuation
- Ensure you and your family and are protected
- Buy an investment property or start an investment plan
- Have enough money to live a comfortable retirement
- Review your loans for a better deal
- Upgrade the family car, caravan or business vehicle



If you are interested in exploring opportunities to improve your personal and financial well-being, scan the QR Code and complete this form online or visit www.carwardines.com.au/financial-planning-services-form and we will be in touch. Or call our office on 07 3355 1800 and schedule a 15 minute phone consult with our Financial Planner, Nathan Watson.



We offer a range of services tailored to your needs, big or small, our team can help you make it happen

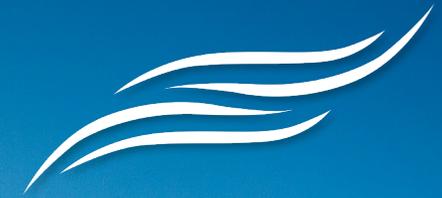


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