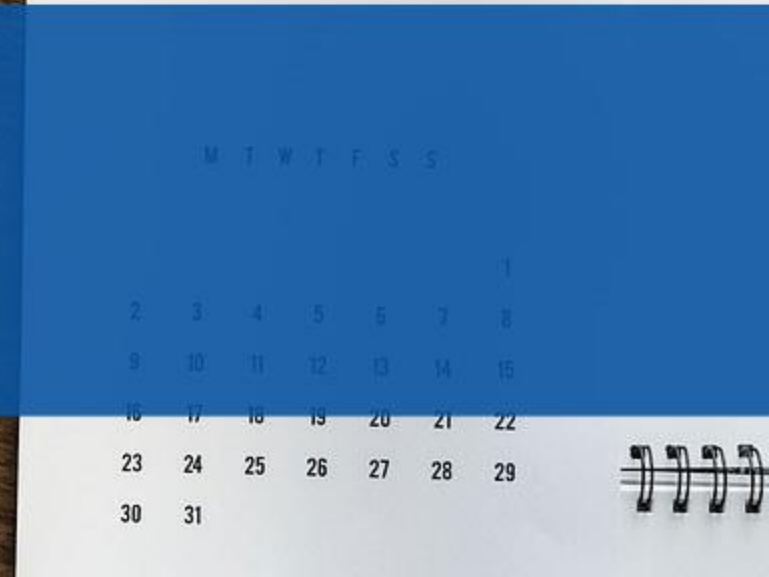




# THE ART OF FINANCIAL ADVICE



# Meet the hosts



**Christopher Whaler**  
**Associate Financial  
Adviser**



**Shelley George**  
**Head of Operations**



**Tim Fuller**  
**Head of Advice**



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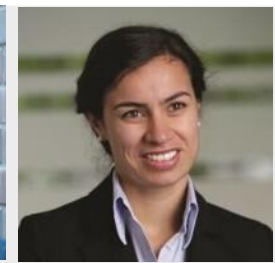
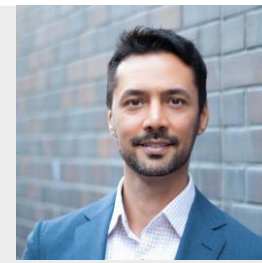


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**Shelley George**  
**Tim Fuller**



# Agenda

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- **When do you need advice?**
- **What can advice offer you?**
- **What is the process for advice?**
- **Why pay for ongoing service?**
- **What options are there for advice?**
- **The evolution of advice has begun!**



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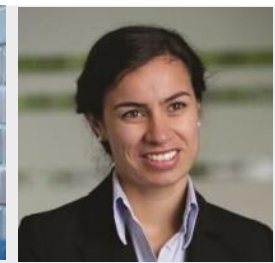
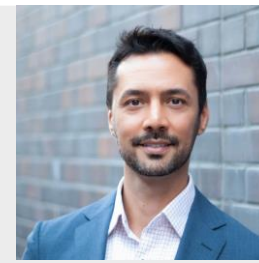


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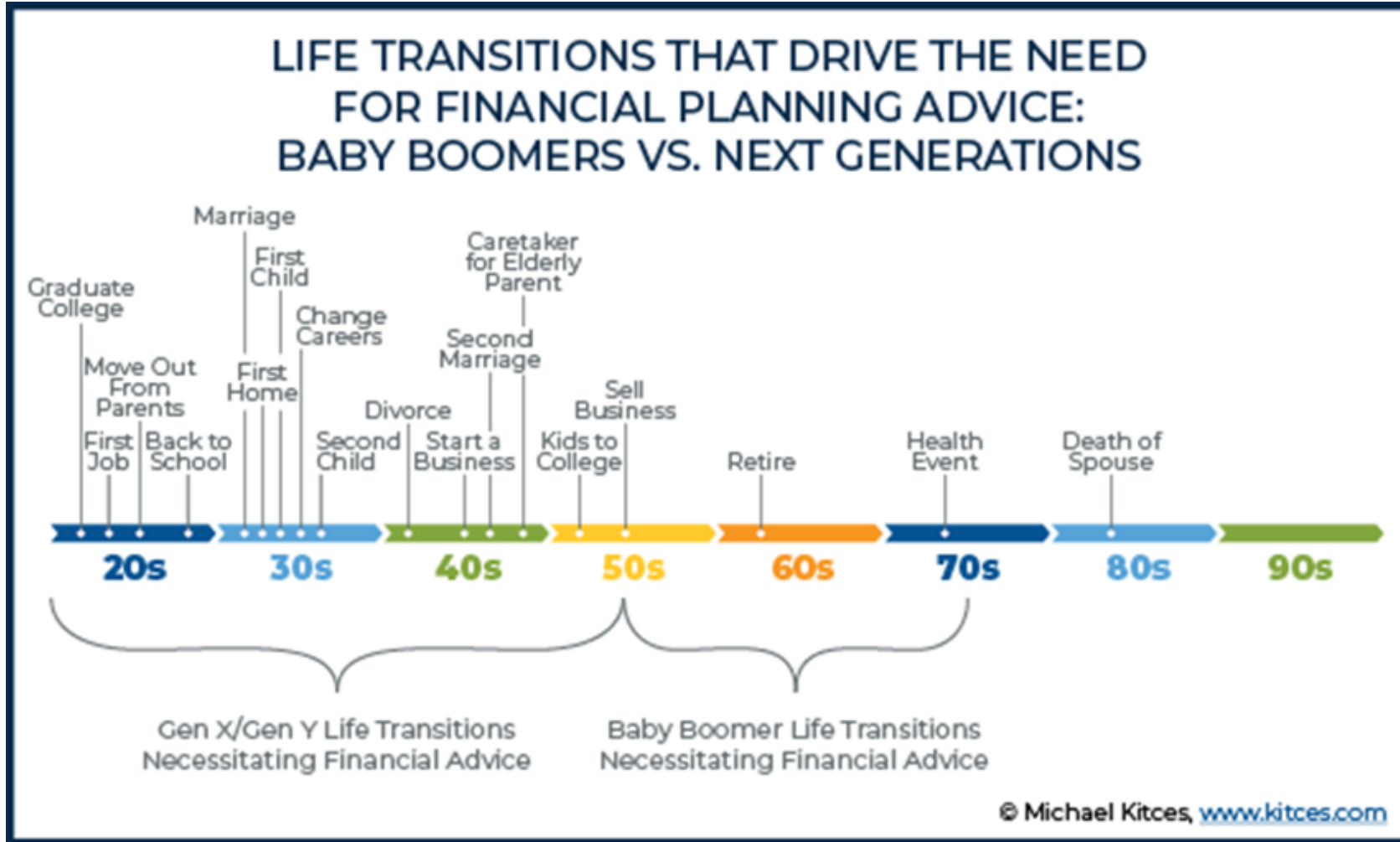


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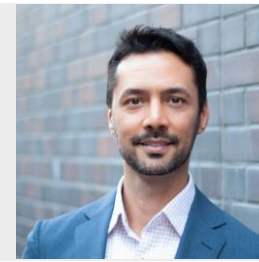


# When do you need advice?



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# What can advice offer you?

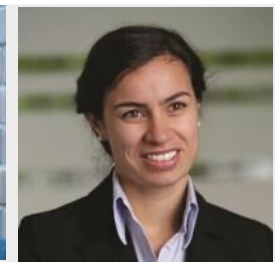
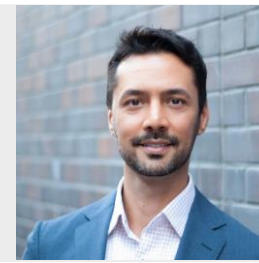
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- Broader investment advice
- Salary packaging and taxation planning advice
- Mortgage and Debt management advice
- Insurance needs analysis and recommendation
- Goals based financial planning
- Retirement planning
- Elder care planning
- Estate planning

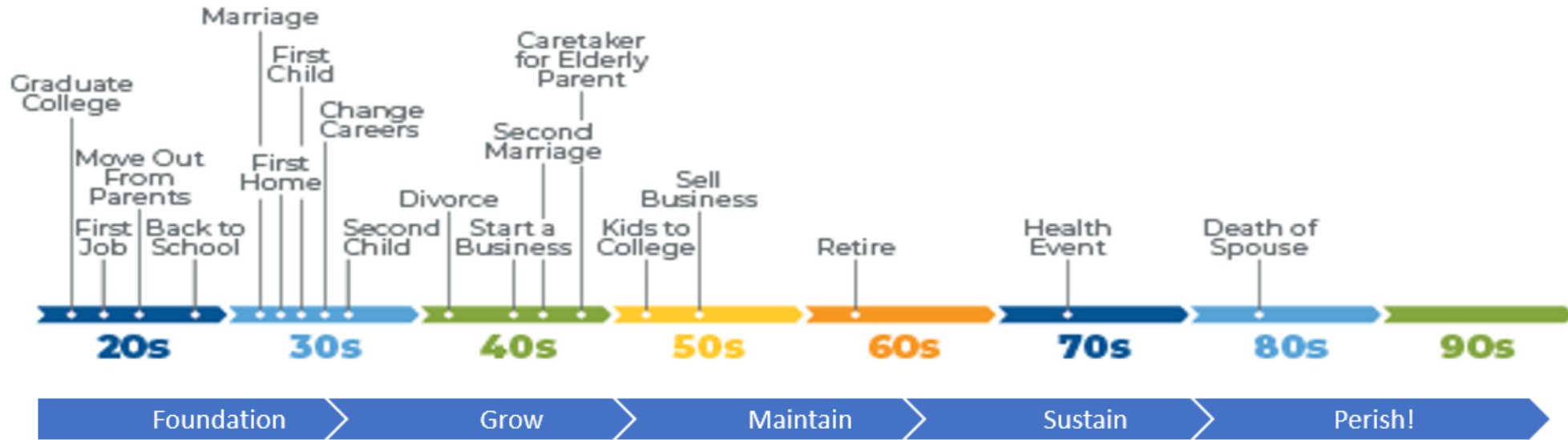


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# What can advice offer you?



- starting a savings plan
- setting financial goals
- preparing a budget
- buying your first
- managing your debts
- protecting your income
- having adequate life insurance

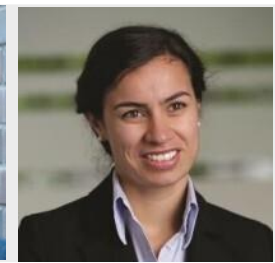
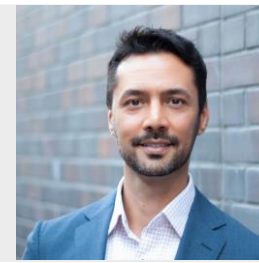
- setting financial goals
- Investing surplus income
- reducing tax
- building your investment portfolio
- purchasing an investment property
- managing your debts and borrowings
- protecting your income
- having adequate life insurance
- making sure your superannuation is in order

- setting retirement goals
- understanding how long your money will last in retirement
- when you can afford to retire
- structuring your accumulated financial assets to maximise your retirement savings
- boosting your savings in preparation for retirement
- making sure your superannuation is healthy and working hard for you
- continuing to accumulate wealth tax effectively
- protect and preserve the wealth you have accumulated
- estate planning (including Wills and Power of Attorney)

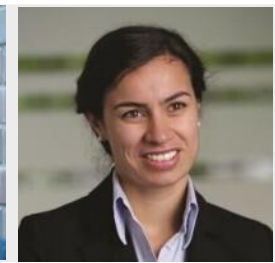
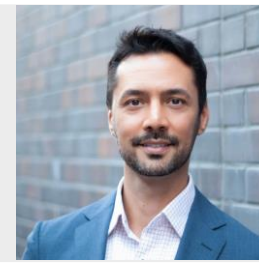
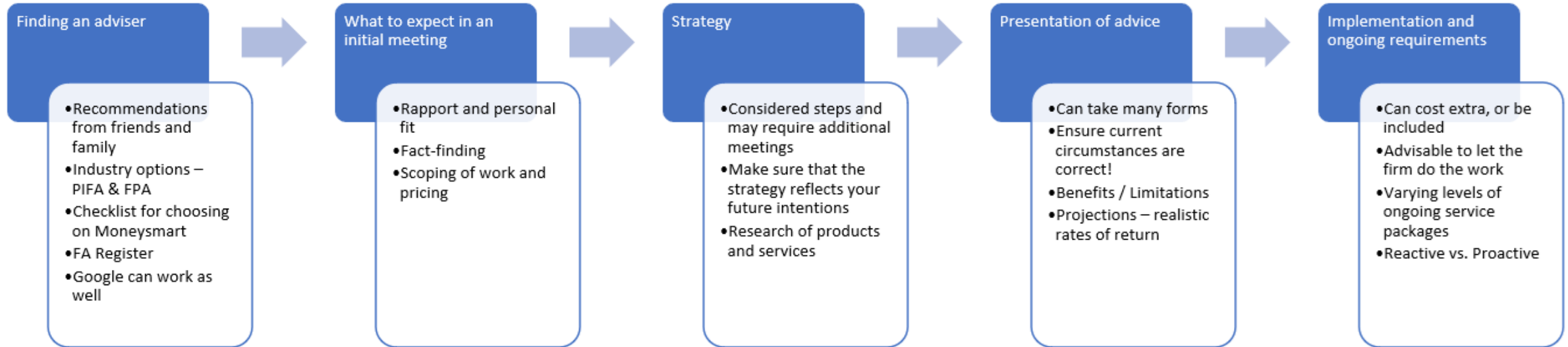


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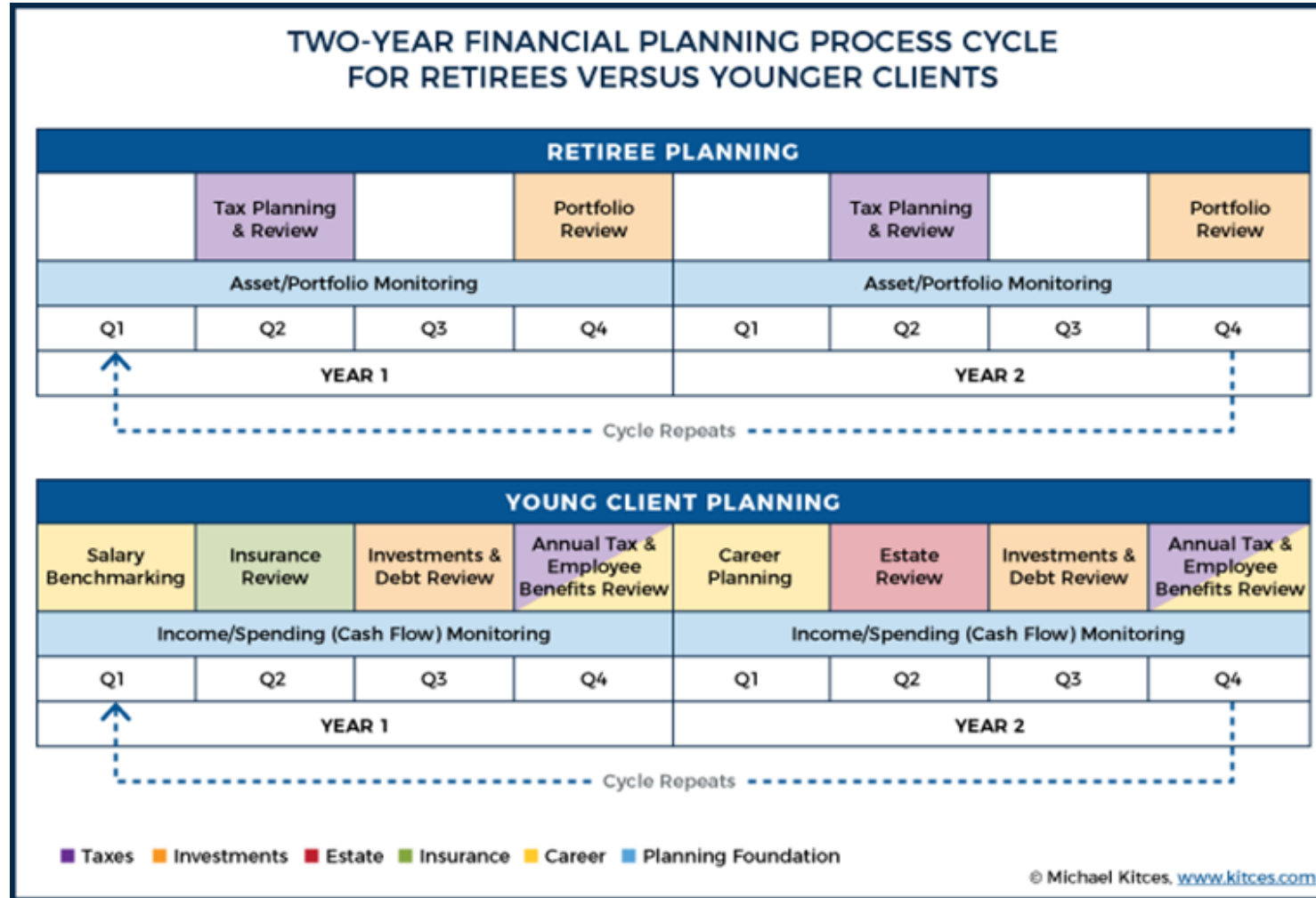
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# What is the process for advice?

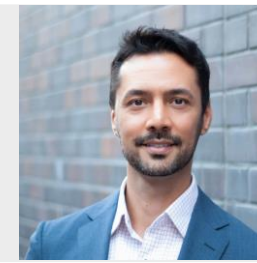


# Why pay for ongoing service?



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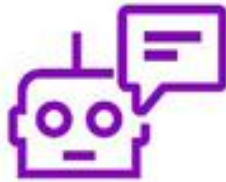
# What options are there for advice?

## CURRENT WEALTH ADVISORY MODELS



### Traditional advice

Human advisors offering one-to-one, product-based counsel.



### Robo-advice

Algorithm-based platform provides advice based on client goals.



### Hybrid models

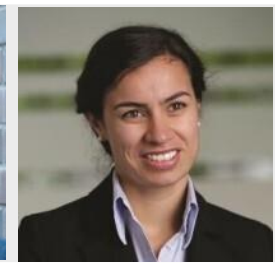
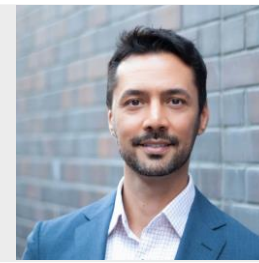
Clients have access to digital tools that facilitate self-investing, but also can tap into human advice on a periodic basis, or as necessary.

Source: Accenture



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# The evolution of advice has begun!

- **Nucleus Wealth - Hybrid Model for advice**
- **Answer client questions**
- **Offer assistance for the onboarding process**
- **Ongoing support**



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[ASK A FINANCIAL ADVISER](#)

**Q: How secure is my investment with Nucleus Wealth?**

POSTED ON [FEBRUARY 5, 2021](#) BY [CHRISTOPHER WHALER](#)

Separately Managed Accounts – The most secure investment structure

Your investment with Nucleus Wealth is under the most secure structure.

Nucleus Wealth provides investments through market-leading investment structures that keep our client's



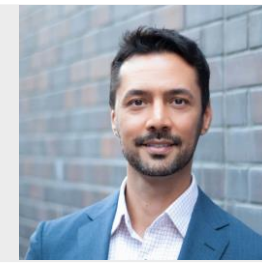
**Q: What is Strategic Asset Allocation (SAA) and Tactical Asset Allocation (TAA)?**

A: Asset allocation refers to the percentage value allocated to each asset in a portfolio of assets. Assets include shares,



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# Viewer question of the week

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What questions do you have for our financial advisers?

Drop your answers in the comments



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next

Thursday, 18<sup>th</sup> February 2021



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