

Types of advisory

Family + Business Advisory

Exploring the complete picture of advice – bringing the advisory resources together



Growth

Advice that helps the client grow.

Examples include:

- Strategic planning
- Business improvement
- Marketing strategy
- Leadership training
- Wealth creation



Implementation

Advice programs that help the client implement strategy and change.

Examples include:

- Board of advice
- Virtual CFO
- Business coaching
- Life coaching
- Financial planning



Protection

Advice that helps the client protect what they have grown and implemented.

Examples include:

- Estate planning
- Succession planning
- SMSF advisory
- Tax structuring advice
- Tax planning
- Insurance – business and general
- IR lawyers



Compliance

Advice that ensures the client complies with legislation and compliance requirements.

Examples include:

- Start-up programs
- Tax advice on new and changing legislation
- HR compliance management