Financial planning to live the life you want.

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AllFinancial SERVICES

PROFESSIONAL PRACTICE
FINANCIAL PLANNING ASSOCIATION of AUSTRALIA

The AFS business

Advice from All Financial Services (AFS) can put you in control of your financial future and help you get to where you want to be.

Ours is a lifestyle approach to financial planning. We are in the business of assisting you to **live the life you want.**

We are one of the Northern Territory's largest financial planning firms employing professionals who as a collective have over 85 years of financial planning experience. AFS has been designated a 'Professional Practice', meaning we comply with a strict code of ethics and rules of professional conduct set by the Financial Planning Association of Australia.

AFS clients have access to an adviser, and a dedicated client services manager who in collaboration with one of the biggest licensees in Australia can deliver services across all areas of financial planning.

AFS have developed strong relationships with a network of professionals to complement their services. Our clients have access to extended referral facilities such as: general insurance brokers, law, estate planning, taxation, and mortgage brokers.

Providing services outside the AFS office is an integral part of our service offering to interstate or traveling clients. Face-to-face or electronic meetings are possible via the latest technology.

For over 20 years, client recommendations have enabled AFS to assist many family and friendship groups by offering guidance and peace of mind. AFS strives to make a difference by assisting you to navigate the complexities of financial management and providing a sense of control that allows you time to focus on other things.

Our Services

- FINANCIAL PLANNING
- RETIREMENT PLANNING
- PERSONAL INSURANCE SOLUTIONS
- SELF MANAGED SUPERANNUATION
- PLANNING FOR A SIGNIFICANT EVENT

Focused Advice

Focused financial advice can help make a difference to your future.

Initial advice with AFS follows the philosophy of addressing five 'must have' areas of advice.

- ✔ Optimise cash flow
- ✔ Transform debt
- ✔ Manage tax
- ✔ Protection for you and your family
- ✔ Maximise wealth creation

Focusing on obtaining control in some or all of these areas can significantly transform financial outcomes.

What you can expect

After two decades in business, we know that our clients like uncomplicated and honest advice. We will take a step-by-step approach to help you reach your goals, guide you through the complex financial world and work with you to create a focused personalised plan to help achieve your goals.

Step 1. Connect with us

Step 2. A discovery meeting enables us to get to know each other

Step 3. Your financial planner will develop a focused plan

Step 4. A detailed walk-through of your financial plan

Step 5. After agreeing on a direction, your personal recommendations will be implemented

Step 6. Once your plan is in place, we can help you stay on track year after year with further advice on an annual basis.

Advice Programs

Our annual advice planning programs are designed to assist you in the management of any external forces or legislative changes in conjunction with your changing financial and personal circumstances.

Private Client Program

AFS Private Client Program is designed for people who are approaching a transition in their lives, such as the sale of an asset, retirement, inheritance or redundancy just to name a few. The Private Client Program caters for a more complex financial situation.

The Essentials Program

This consolidated service package is suitable if you are in a reasonably straightforward financial situation and do not have complex ongoing financial demands. As your circumstances evolve, you will have access to the AFS Private Client Program that offers a more comprehensive solution when required.

Specialist Services

Customised services that focus on your specific area of need can be constructed on an annual basis or as an ad-hoc service to cater to your unique situation. These services may include working with:

- **Estate Planning Coordination**
- **Self Managed Super Funds**
- **Direct Share Portfolio**