



Welcome to Medical Wealth Advisory

We are a specialised service, dedicated to helping Medical Professionals, reach their financial goals and objectives through innovative financial strategies, structures and solutions.

We have a significant understanding of the Australian medical profession and the evolving health care industry.

Its this expertise that allows us to provide services tailored to cover all your financial needs.

Our commitment to providing you with specialist financial advice and ongoing support services, ensures you can continue to focus on providing your patients with high quality care.

Financial Services

Our advisers have an expert understanding of the financial situations and opportunities that medical professionals face and can offer sound wealth management advice based on many years of experience. We specialise in:



BUSINESS
ADVISORY



DEBT
MANAGEMENT



ESTATE
PLANNING



FINANCIAL
PLANNING



INVESTMENT
ADVICE



PERSONAL
INSURANCES



RETIREMENT
PLANNING



SUPERANNUATION



TAX PLANNING

Lending Services

Taking on debt is often a significant part of many financial plans. There are many lenders and loan products available but it's how to structure your loans to maximise tax effectiveness and affordability as part of your overall plan, that's most crucial. Our service and advice can assist you to pay off debt faster, leaving you with more time to continue to build your wealth and that is what's most important to us. Our lending services include:



BUSINESS



COMMERCIAL
PROPERTY



EQUIPMENT
& FIT OUT



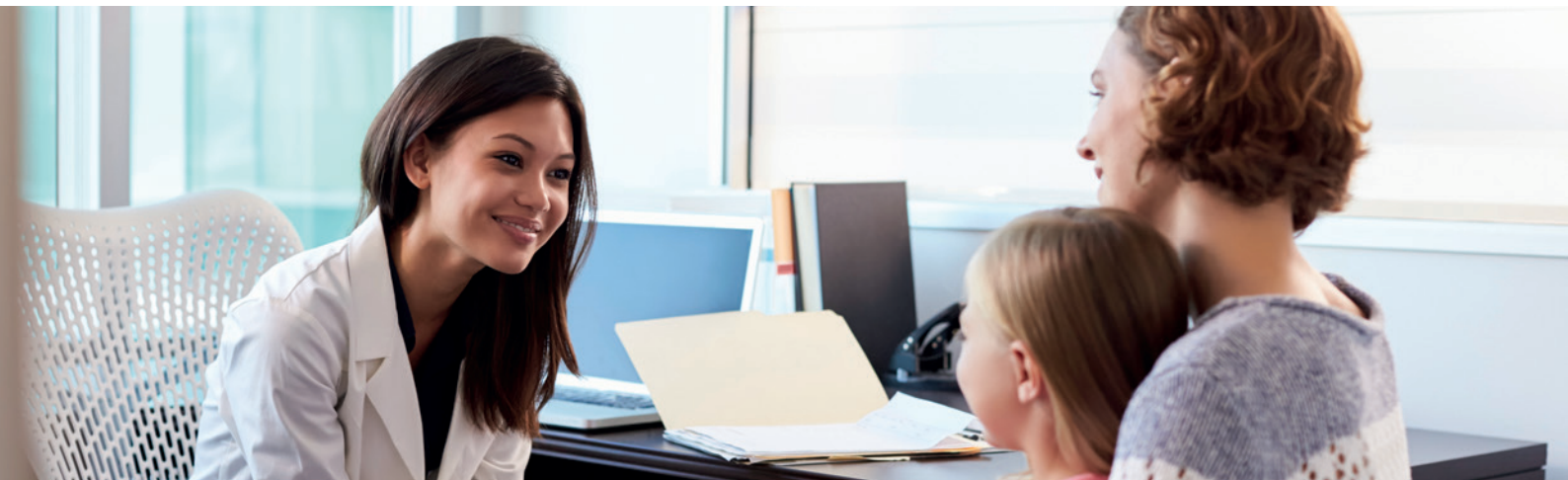
INVESTMENT
PROPERTY



MOTOR VEHICLE
FINANCE



RESIDENTIAL



Strategy. Structure. Solution.

A Comfortable Choice

- ✓ **Specialist Advice**
Experienced professionals, innovative solutions specific to your industry.
- ✓ **Comprehensive Service**
Broad range of financial services & expertise to cover your needs.
- ✓ **Complimentary Engagement Process**
Understand what value our specialist service can deliver, without charge or obligation.
- ✓ **Rapidly Growing Community**
Join other medical professionals in getting industry specific service and solutions.
- ✓ **Enhancing Relationships**
Working collaboratively with existing relationships to maximise the value delivered.
- ✓ **Expert Financial Support 24/7**
Available around the clock when you need support and advice.



Realising the benefits of a financial plan requires a strong relationship with your financial adviser and your long term commitment to staying the course. It also relies on an integrated approach to make sure that all elements of your plan are structured to work together.

We have a long track record in helping high-achieving medical professionals to realise their financial objectives and lifestyle goals.



MEDICAL WEALTH ADVISORY



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