PARTNERS
WEALTH GROUP

Helping you to navigate life's financial decisions

Why Partners Wealth Group

At Partners Wealth Group, we believe that your financial wellbeing comes from the support of a collaborative team of professionals, working together to help you and your family navigate life's financial decisions.

For more than 20 years, we've firmly believed in providing our clients with personalised financial advice and making decisions that always put their best interests ahead of everything else. We use our diverse range of products and services to tailor our advice to suit your individual needs, with our specialist skillsets there to implement the best possible strategy on your behalf.

This commitment to working together to provide personalised advice is the foundation of our success and what makes us a leader in the field.

Stronger Together

A trusted partner for your financial journey

Wherever you are on life's journey, choosing Partners Wealth Group as your trusted partner means you'll receive tailored, expert advice to help you explore and fulfil your life goals.

We bring together a team of experts across financial advice, listed and unlisted investments, legal, lending and superannuation, to create individual financial strategies that will guide you to financial strength. Whatever your desired outcomes, we'll provide you with the best solutions to grow, protect and preserve your wealth.

An integrated approach to your wealth

Providing our clients with a complete and holistic financial services solution is what sets us apart. Our team of diverse and highly specialised experts work closely with your accountant or other trusted advisors to form a comprehensive wealth strategy.

This genuine approach to collaboration is at the heart of our philosophy of being stronger together, and is encapsulated in our logo design of three geese flying together in formation, representing our clients, our partners and ourselves working together for better outcomes.

Our services

When you partner with us, you can count on a collaborative and personalised approach to helping you achieve your financial and lifestyle goals. No matter how simple or complex your own situation is, we'll work with you, your family and your accountant to tailor our innovative financial solutions towards achieving your desired outcomes.

Whether it be creating or protecting your wealth, preserving it for future generations or planning for your retirement, we have the expertise and track record to support you through your own unique life journey.

Financial Advice

We're there to help and support you at every stage of your life, from beginning a career, buying a home and starting a family, through to establishing a business, creating wealth, planning for retirement, and aged care solutions.

Investment & Wealth Management

Through proven experience and market leading insights, our in-house investment team can support you through your own investment and wealth management journey.

We can provide you with bespoke investment services, diversified portfolio management and integrated wealth management strategies. We'll advise you on the most effective asset allocation to suit your risk tolerance and timeline, and support you with regular investment updates and reviews.

We firmly believe our active portfolio management will deliver you the best blend of risk and return, while yielding superior results over the long run.

Unlisted Investments

For our sophisticated investors, we can offer you access to exclusive off-market wholesale investment opportunities across a broad range of asset classes including property, private equity, infrastructure, private credit and agriculture.

Lending & Finance Broking

Our experienced team of lending advisors will work closely with you and your own financial advisor to tailor the most appropriate lending solution for your needs.

Whether it be purchasing a family home or investment property, buying your business premises, financing a commercial development, ensuring your business cash flow or any other borrowing arrangement, our lending team are there to assist you.

Legal Solutions

Our incorporated legal practice, Partners Legal Solutions, can provide you with a comprehensive range of legal services, and trusted advice to support you on both a business and personal level.

Our legal services include corporate, commercial and property law advice, litigation, business succession planning, wills and estate planning.

Wealth Protection

Our experienced advisors will recommend the right level of insurance cover to look after you, your loved ones and your financial security, by protecting your lifestyle, business, retirement plans and your wealth creation strategy.

Self-Managed Super Fund Administration and Audit

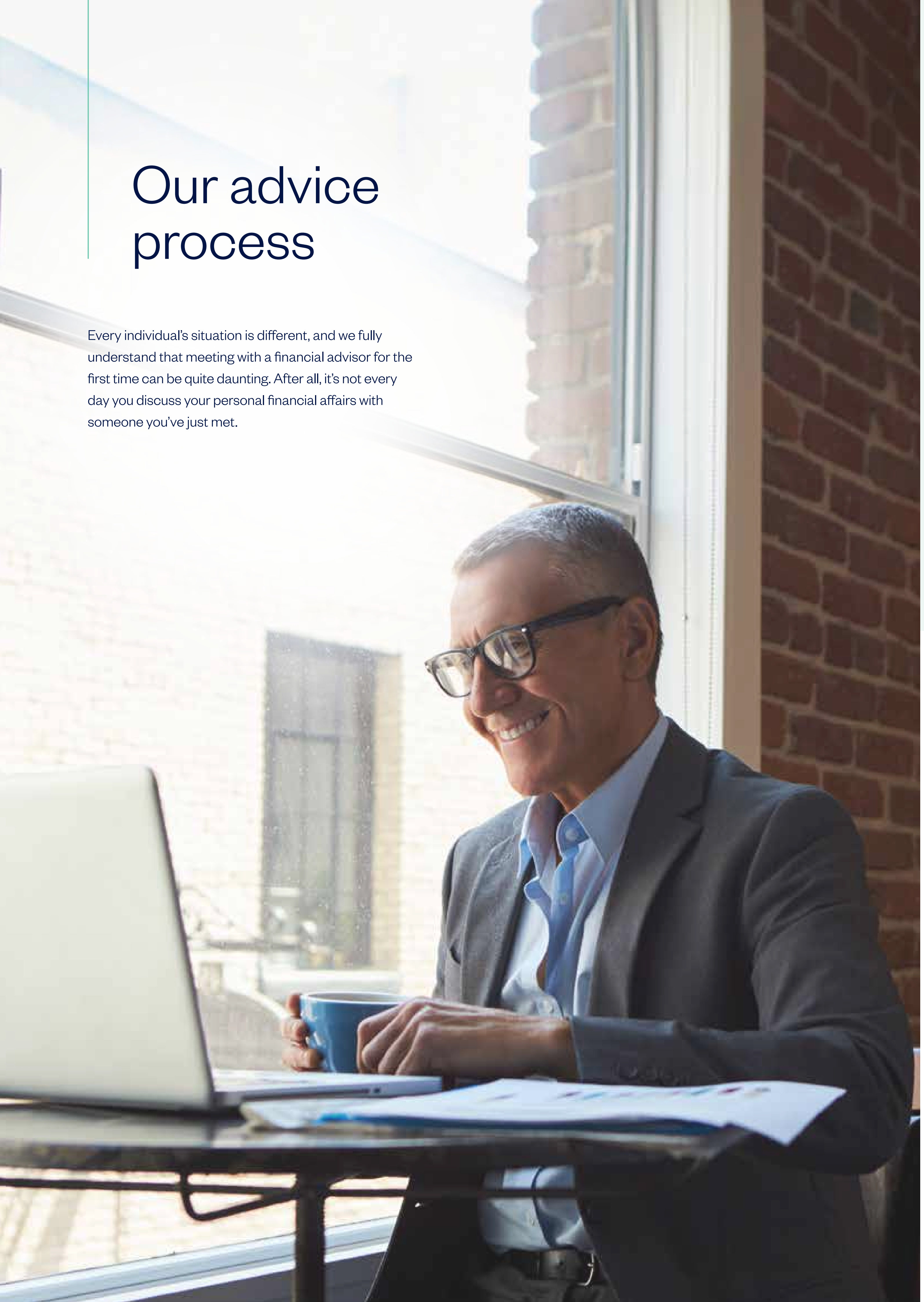
Our in-house team of highly experienced SMSF experts take the complexity out of SMSF administration and audit. Our proven and unique methodology is tailored to your unique needs to provide an efficient and cost-effective service.

Aged Care

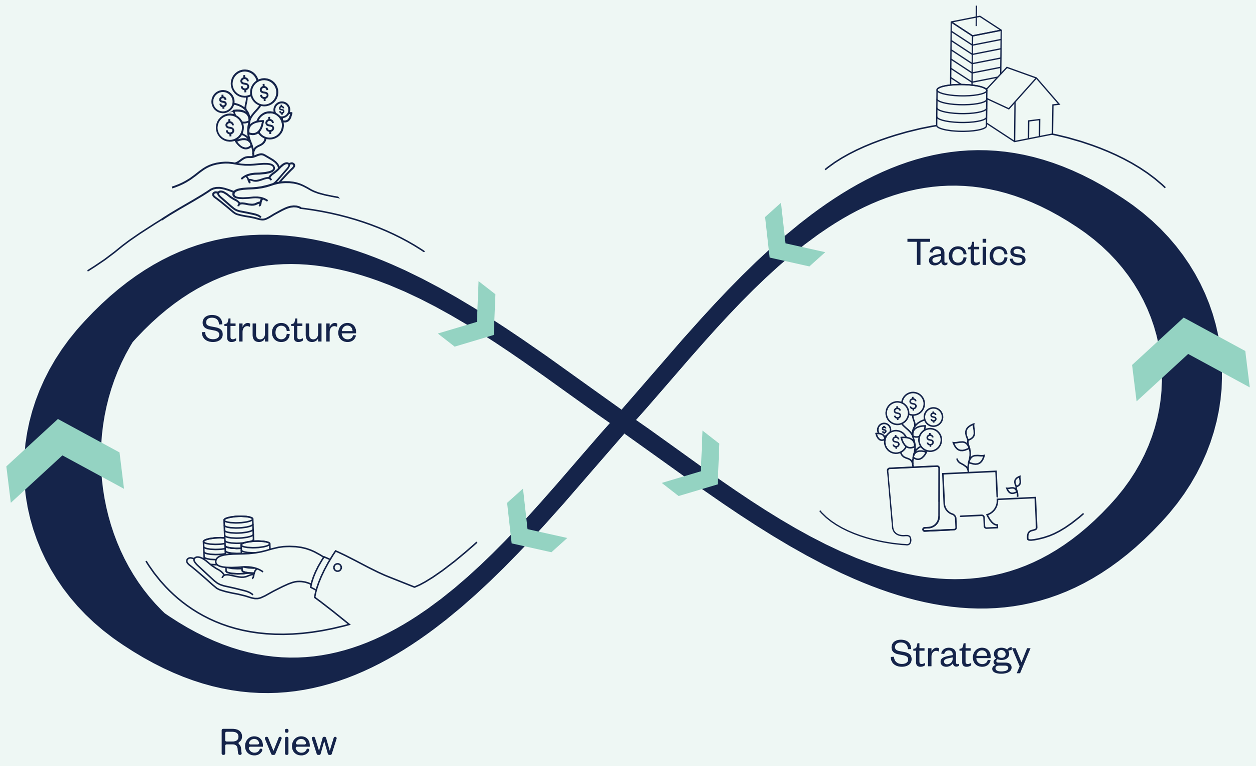
Our specialist aged care advisors can help you and your loved ones navigate the complex world of aged care, ensuring informed and considered decisions are made regarding finances and care options.

Our advice process

Every individual's situation is different, and we fully understand that meeting with a financial advisor for the first time can be quite daunting. After all, it's not every day you discuss your personal financial affairs with someone you've just met.



Advice Process



We've spent the last 20 years refining our advice process, to ensure we fully understand your situation, and can work with you to create the best strategies and solutions to meet your needs.

Regardless of your life stage and financial situation, the first step is to get the right advice on structuring your assets and wealth. This can make a significant difference to the amount of tax you pay. We work with your accountant to ensure we have a strategy on this now, and into the future.

After establishing the right structures, we look at your risk tolerance and comfort level on different investments, your age and investment timeframe, what your cashflow looks like and how we best utilise this, as well as what your income needs are now, and into the future to ensure financial freedom.

Once we have determined the best strategy and agreed on how to best meet your goals and objectives, we build and implement the right financial plan for you, with a mix of investments to suit your needs.

Your situation, the environment you live in and your goals will almost certainly change along the journey.

It's important that we review your structure, strategy and tactics on a regular basis to ensure they each remain relevant and are aligned to your family's lifestyle and financial goals. Depending on your needs, we'll meet with you regularly to ensure you're on track to achieve the best financial outcomes and have peace of mind along the way.

About Partners Wealth Group

The Partners Wealth Group story began in 2003 when our founders had the foresight and ambition to bring together a unique group of professional partners combining distinct talents, financial experience and creative insight.

Inspired by the belief that power comes from strength in numbers, we have worked closely with hundreds of professional partners including accounting firms, property advisors, business consultants and legal teams to deliver personalised advice and superior financial outcomes.

We value integrity and pursuing excellence in everything we do, operating in the right way from the very beginning, and always working to the highest ethical standards with your best interests at heart. Our client relationships are fee based and built on trust and an intimate knowledge of your financial position and future lifestyle aspirations.

At Partners Wealth Group, we think we do things a little differently, but better. We continue to thrive as a privately-owned, innovative and highly motivated wealth advisory business, and a recognised leader in our industry.

Award Winning Advice

Partners Wealth Group is a multi-award-winning wealth management firm. We have been recognised across a range of awards over the years for our commitment to excellence and exceptional client outcomes, and several of our senior advisors have been featured in Barrons' Top 100 Advisors Australia every year since 2021.

Our business has also been recognised for its outstanding culture and commitment to its employees. We have achieved Great Places to Work certification and have been awarded one of the AFR BOSS Top 10 Best Places to Work in Banking, Finance & Superannuation.

Our Values: Integrity, Excellence, Collaboration, Accountability, Resilience

A genuine approach to collaboration is at the heart of our philosophy of being stronger together. This is encapsulated in our logo of three geese flying in formation, representing our clients, our partners and ourselves working together for better outcomes.

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