NICHOLLS WEALTH Solutions

Committed to protecting, managing & growing wealth

ABOUT US

We are specialists in wealth creation and dedicated financial advisors, offering quality guidance for over 25 years. Our mission is to assist valued clients in reducing the stress associated with money management while helping them reach their goals more quickly. We are driven to support clients at every life stage in building wealth, planning for and enjoying retirement, and attaining their ideal lifestyle. With our comprehensive and high-quality advice, we are well-equipped to help clients accomplish their wealth and lifestyle aspirations. We believe that the more you understand about money, the less you need to worry about it. It goes beyond finance; it's about empowering others as well.

WHAT WE DO

No matter if you're looking to prepare for retirement, save for that dream vacation, or simply wish to improve your household financial management, we are here to assist you.

- Wealth Creation & Management
- Estate Planning
- Investment Strategy & Portfolio Management
- Life Insurance & Income Protection Advice
- Superannuation & SMSF Advice
- Cash Flow & Debt Management
- Retirement Income & Aged Care Planning
- Centrelink Advice & Assistance

FINANCIAL PLANNING PROCESS

At Nicholls Wealth Solutions, we are dedicated to providing you with the freedom and options you deserve regarding your finances and your life. Explore our straightforward advice process to understand how we collaborate with you.

	ENGAGE	COLLECT	ANALYSE & DEVELOP	PRESENT	IMPLEMENT	REVIEW
Expected Timeline	Week 1	Week 2 - 4	Week 5 - 7		Weeks 8+	Ongoing

OUR SERVICES - REVIEW

Annual reviews provide a valuable opportunity to evaluate the progress of the goals and objectives outlined in your original plan.

This review allows you to discuss any adjustments you wish to make, and the Adviser may also offer recommendations in response to market or other changes to better align with your goals and objectives.

AS PART OF THE ANNUAL REVIEW SERVICE WE:

- Reconfirm your goals and objectives.
- Consider any changes in your personal or financial circumstances.
- Review your risk profile, asset allocation, and risk management strategy to ensure your comfort with them.
- Evaluate the performance of your funds against your planned projections and provide an update on the current economic landscape.
- If there have been any legislative changes, we will discuss the necessary adjustments to your plan during the review.

SERVICE AND PRICING GUIDE

Initial Advice Fees	
Advice Preparation Fee/Adviser Service Fee A one-off fee charged upfront for preparation of the advice, including research, expertise, (preparation of the advice document).	From $3,080 - $19,800*

Ongoing Services	
Annual Review (including provision of an advice document)	From $3,600 - $19,800*
Other services included	
Administration support and access to adviser	
Centrelink updates as required	
Regular economic updates (newsletters)	
Liaise with Professional Advisers as applicable upon request (Accountants, Mortgage Broker, Solicitor)	
Client Portal *Secure communication through your Client Portal including online document acknowledgement, storage and upload facilities.*	
Annual client seminar and market update	
Proactive contact as necessary	
Various other communication - Managed Account information (as applicable), emails, birthday/Christmas cards	

Ad Hoc (Needs Based) Advice Fees	
Centrelink Advice & Assistance (No Annual Review) Centrelink updates as required	Client Service Officer: $330* per hour Financial Adviser: $440* per hour

*All prices include GST.