

LIFE IS UNPREDICTABLE – THE BRIGHT WEALTH EXPERIENCE
WILL ENABLE YOU TO RELAX KNOWING YOU CAN ACHIEVE
YOUR DESIRES NO MATTER WHAT LIFE THROWS AT YOU.

BRIGHT
• WEALTH

The Bright Wealth experience is a unique process that guides you through an effective, yet simple series of decisions that will form the basis of a clear-focused and structured plan to maximise your future security.

BRIGHT
WEALTH
EXPERIENCE

- 1. DISCOVERY MEETING**

The Bright Wealth experience begins with you sharing your financial and lifestyle goals. We gain a thorough understanding of your current financial position and personal values. After our first meeting, we mutually decide whether Bright Wealth is the right firm to partner with you on this journey.
- 2. STRATEGY MEETING**

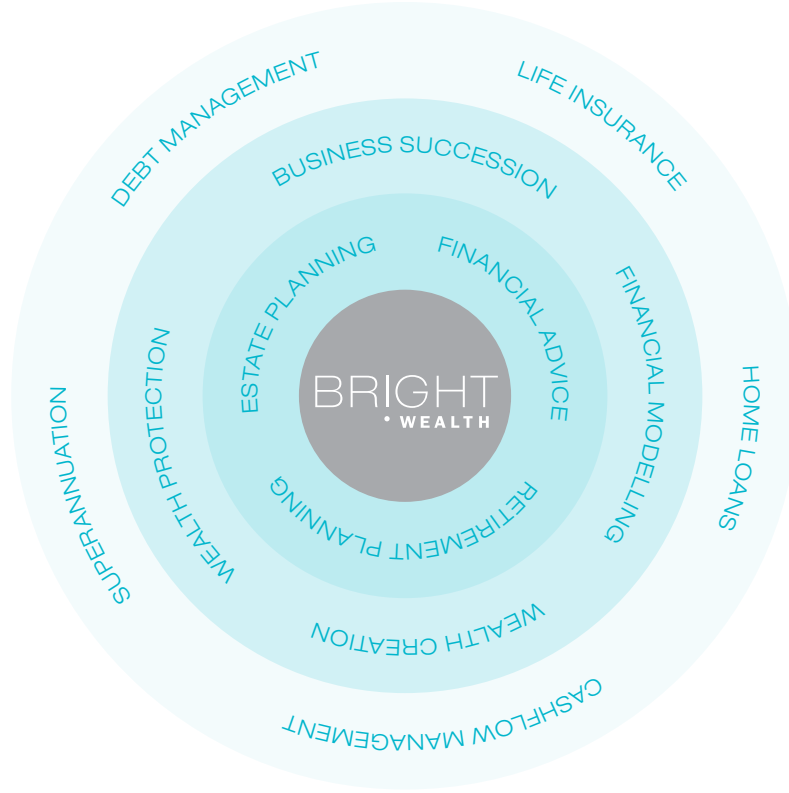
After analysing your situation with our team, we meet again to outline the various strategy options available to you to strike a balance between desired lifestyle and building wealth. This session not only provides you with a range of possible solutions, but also answers many long-unaddressed questions, as we work through the options available to you.
- 3. DESIGN**

You may have just one, or multiple strategy meetings. We will spend the amount of time necessary to get your plan right, before we move forward. At this point we will agree upon the optimum selection of strategies that together form your financial plan. This will place you in the very best position to achieve your desired outcomes.
- 4. IMPLEMENTATION**

Your financial plan will be designed to achieve positive outcomes immediately, whilst continuing to be dynamic and relevant to your life at any given time in the future. As your plan is set in to motion, we will undertake the administrative processes necessary to implement your agreed strategies.
- 5. REVIEW**

Our review service is available to track legislative and market influences, and if you choose to, we can meet regularly to keep up to date with what is happening in your life. Your plan will remain flexible to reflect any life changes to ensure that your outcomes are still reached, regardless of what life throws at you.

WHAT WE DO FOR YOU:



Bright has a holistic and flexible approach to serve your financial circumstances as they continue to evolve over time.

OUR DISCIPLINED PROCESS MAKES SENSE OF YOUR AFFAIRS - ARRANGING YOUR FINANCIAL SITUATION IN TO A CLEAR, SUCCINCT AND POWERFUL PLAN THAT ALLOWS YOU TO RELAX IN THE KNOWLEDGE OF A SECURE FUTURE.

FINANCIAL ADVICE
LIFE INSURANCE
RETIREMENT PLANNING

ESTATE PLANNING
HOME LOANS
FINANCIAL MODELLING

DEBT MANAGEMENT
SUPERANNUATION
BUSINESS SUCCESSION

WEALTH ACCUMULATION
INVESTMENTS
CASHFLOW MANAGEMENT

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