PWS Professional Wealth Services

CAPABILITY STATEMENT

ABOUT US

You have identified the need to take some steps towards building a more solid financial future.

At Professional Wealth Services we are committed to helping you achieve your wealth, lifestyle, and legacy goals through a collaborative, planning based approach. We deliver holistic and robust financial strategies so that our clients can enjoy the peace of mind that comes with knowing their financial future is in safe hands.

COMPREHENSIVE FINANCIAL STRATEGIES

CORE COMPETENCIES

Professional Wealth Services (PWS) is a well-resourced yet boutique self-licensed AFSL with no institutional ties, ownership or product bias.

We help our clients get financially prepared for both the challenging and rewarding times in their life.

Our Advisers are all qualified and registered with ASIC, are licensed under Australian Financial Services License, and authorised to provide personal advice in relation to relevant financial products for retail and corporate clients.

QUALIFICATIONS AND TOP SKILL SETS

- Certified Financial Planner (CFP®), the highest internationally recognised qualification within the industry
- SMSF Specialist Advisor™
- Specialist accreditations in listed securities, age-care and self-managed superannuation
- All our Advisers are accredited to deal in PPS Mutual life insurance products specifically designed for and exclusive to professional occupations

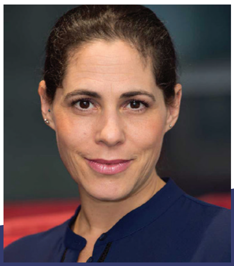
DIRECTORS OF PWS ADVICE

It's our mission to deliver goals-based advice outcomes and ensure you reach your objectives.

- PWS Advice Directors

With a high-level of Director involvement within the business, you can be assured that we are committed to providing clients with exceptional service, compliant and strategic tailored advice.

DON JEFFERS
CFP®
MANAGING DIRECTOR
FINANCIAL ADVISER



NAOMI ROSENTHAL
AFP®
DIRECTOR
FINANCIAL ADVISER

YOSHA STEEGHS
AFP®
DIRECTOR
FINANCIAL ADVISER

JONATHAN YOUNG
CFA® CA
DIRECTOR
FINANCIAL ADVISER
RESEARCH MANAGER

PWS Professional Wealth Services

Live a financially confident life

ABOUT YOU

We pride ourselves on transparency and open communication – above all, keeping your best interest in all that we do and working in unison towards your goals.

Our team of financial experts take the time to understand your circumstances, challenges and goals, before creating a wealth-building strategy in collaboration with your other professional advisers. Our goal is to partner with our clients and empower them to live their lives with financial confidence.

WORKING IN UNISON TOWARDS YOUR GOALS

A PERSONALISED APPROACH

If you are looking for a personalised approach – a team who can delve into and understand your individual needs – we can help you to:

- take a holistic view of investment opportunities and consider a wide range of financial products and services
- access specialist insurance knowledge and quality cover - we can provide you with pro-active comprehensive advice, allowing you peace of mind now and, more importantly, at claim time
- tailor the right solution to reach your full wealth potential by productively working with other professional advisors, such as your Solicitor or Accountant

OUR CLIENTS INCLUDE

- Barristers / Legal Professionals
- Chartered Accountants
- Medical Professionals
- Privately owned businesses and partnerships
- Project Management & Property Investment firms
- Merchant Bankers

CLICK HERE TO READ AND WATCH

TESTIMONIALS FROM OUR CLIENTS

STRATEGIC FINANCIAL ADVICE

- SMSF, Superannuation & Retirement Planning
- Investment
- Life Insurance & Claims Advocacy
- Estate Planning & Aged Care
- Budget/Cashflow/Debt Structuring
- Business Succession

CORPORATE CLIENT SERVICES

- CPD/CLE for Law Firms and Barrister Chambers
- Group Salary Continuance
- Group Life & TPD Insurance
- Health & Financial Wellness program
- Seminar/Workshops

OUR PROGRAM ACHIEVES

- Lower employee stress
- Lower insurance premiums/claims
- An increase in productivity

Top professional firms consider Group Insurance as an essential employee benefit and risk management tool.

Professional Wealth Services

Australian Financial Services Licence No. 312047.

PO Box 1815, North Sydney, 2059.

info@pws.net.au | 1300 001 312 | pws.net.au | FOLLOW US ON LINKEDIN

TAKE OUR FREE 5 MIN FINANCIAL HEALTH CHECK