

## THE 6 PROVEN WAYS FINANCIAL ADVISORS ADD VALUE

### BETTER HABITS Left alone, investors often make choices that impair their returns and jeopardize their ability

to fund their long-term objectives. BEHAVIOR GAP Investment

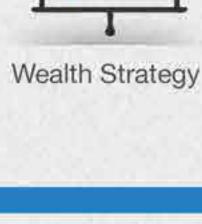


Investor Return

THE RETURN YOU ACHIEVED

**OUR SERVICES** 









BETTER DECISIONS

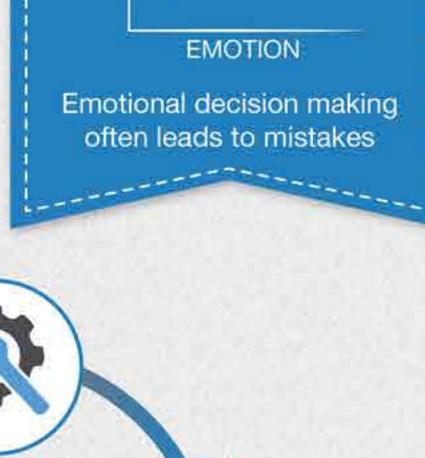
### their clients' tendencies to chase returns or run for cover in emotionally charged markets.

MONEY

Advisors, as behavioral coaches, can act as emotional

circuit breakers in bull or bear markets by circumventing







WHICH **INVESTMENTS?** 

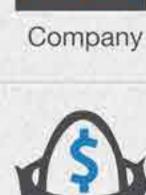
WHICH TAX STRUCTURE?

Wealth Building

Expenses

WHICH TAX

**DEDUCTIONS?** 



Family Trust



Superannuation



excluding medicare levy)

The Return to

You After Tax

**OUR SERVICES** 

Virtual Accountant

\$25,000

\$0

\$25,000





Interest

Deduction



Property



**Short Term** 

Capital Gain

\$25,000

-\$11,750

\$13,250

Tax Aware Investments

Shares



**Fully Franked** 

Dividend

Investment Structuring

BETTER RETURNS (

3% p.a.

added value

A good financial advisor will be able to add

'about 3%' per year to your investment portfolio.





Annum



8%



Dollar Cost Averaging

After 30 Years

With Advice



\$233,048

\$216,097 />



**BETTER TIMING** 

No Advice THE DIFFERENCE TO YOUR NEST EGG

NO Advice

With Advice

\$503,133 5

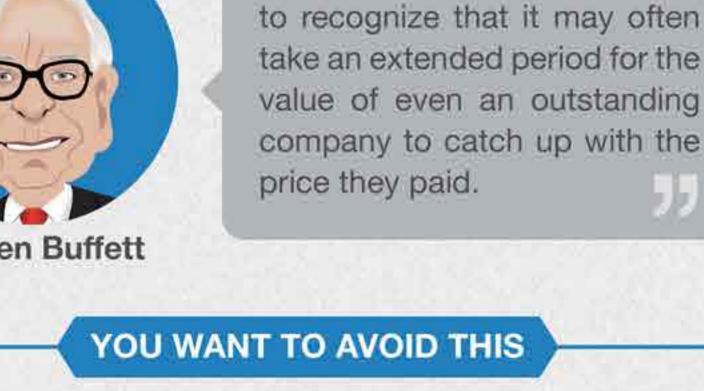
Investment Analysis

SOURCE: Quantifying Vanguard Advisor's Alpha" March 2014



Investors making purchases

in an overheated market need



...Repeat Until Broke! Fear/Sell

# Real Time Advice

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Stop Loss Management

Pension Income



Retirement Strategy Strategy





JAS WEALTH

HELPING SUCCESSFUL INDIVIDUALS TURN THEIR MONEY INTO WEALTH

Warren Buffett YOU WANT TO AVOID THIS Greed/Buy

> Buy & Sell Recommendations

Value Added \$22.63 **Base Income** \$100 \$100

\$122.63

Source: Morningstar, "Alpha, Beta, and Now...Gamma", 2013.

Isn't it about time you

spoke to an expert?

\$60 \$40 \$20 \$0 **OUR SERVICES**