

7 STEP WEALTH CREATION FRAMEWORK



1. Create Plans

Prepare for life's significant moments, such as retirement, caring for elderly parents, assisting children with home deposits, downsizing, receiving inheritances, and renovating. Our service helps you manage these crucial events, ensuring a fulfilling retirement lifestyle.



5. Invest Wisely

Align your investments with your desired performance level and risk tolerance. We offer research-backed investment strategies and conduct regular portfolio reviews to ensure consistent performance and mitigate risks during market downturns.



2. Generate Income

Focus on creating a tax-free income stream (0%) for retirement, designed to last a lifetime. This approach is all about generating sustainable, tax-efficient income that not only supports you in retirement, but also helps in building wealth for your lifestyle or further financial growth during your earning years.



6. Protect Assets

Our asset protection strategies are designed to safeguard your wealth within the family lineage, protecting against potential family, legal, or business risks. This includes plans to secure your financial position in cases of income loss, injury, or illness.



3. Minimise Tax

Our aim is to reduce tax liabilities both currently and in the future. By implementing effective tax minimization strategies, we ensure the longevity and sustainability of your wealth and income.



7. Make Gifts

Plan effectively for gifting to children or charities and creating a lasting inheritance. We ensure that your assets are distributed according to your wishes to your intended beneficiaries after your passing.



4. Optimise Debt

We provide insights on distinguishing 'good' debt from 'bad' and advise on optimal debt management strategies. This includes evaluating interest costs and debt reduction versus making superannuation contributions.

FOR A GREAT RETIREMENT *Lifestyle*



Roger Perrett
Partner & Founder Executive Financial Advisor
B.Bus ADFP ADA1 SMSF

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 freshwaterwealth.com.au

 @rogerperrett

Freshwater Wealth Management Pty Ltd
ABN 296 731 232 45 | AR 1002667

Alliance Wealth AFSL No. 449221
ABN 93 161 647 007

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