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Lachlan Partners Pty Ltd, ACN 128 895 947

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**LACHLAN PARTNERS**



## AT LACHLAN PARTNERS, EVERYTHING CONNECTS

You can see it in our brand mark. You can see it in the relationships we've established with generations of clients. You can see it in the way our services have been designed to work in harmony with each other.

As one of Australia's most trusted and reputable private advisory firms, our range of business and financial advisory services has been created with pure financial synergy in mind. It enables us to look at the bigger picture of your overall needs and provide one powerful integrated solution. We offer the kind of solution that comes with the outstanding level of personal service that you expect from a more intimate financial establishment like Lachlan Partners.

But that's not all that sets us apart. It's worth noting we operate strictly on a fee for service basis, which means the advice we offer is totally independent and objective. Our sole purpose is to help you achieve your financial and lifestyle goals.

At Lachlan Partners, you'll be dealing with professionals who have a proven track record. They are committed to building meaningful, long-term relationships with you and are passionate about making your financial master plan connect perfectly. We help you get the most out of life.

“OUR INTELLECTUAL CAPITAL AND APPROACH TO BUILDING MEANINGFUL CLIENT RELATIONSHIPS MEANS OUR CLIENTS ARE IN VERY GOOD HANDS...”

### WEALTH MANAGEMENT

Our Lachlan Partners' Wealth Management division places great emphasis on working with you to outline and achieve your lifestyle and financial goals. To us, it's the most important part of successful wealth management. While some financial service providers focus on selling you short term investment products, we like to create water tight, tailored strategies that add genuine value to your life by helping you achieve your goals.

#### *Wealth Management Services*

- Investment advice and portfolio management
- Wealth creation
- Superannuation/SMSF advice
- Philanthropic management and advice
- Estate planning including Wills, Powers of Attorney and Guardianship
- Retirement Planning

### PROPERTY ADVISORY

Whether you are starting your property portfolio or are seeking to enhance it, Lachlan Partners Property Advisors Pty Ltd's aim is to maximise the return on your investment and save you time. Let us source you a property for purchase, or deal directly with real estate agents if you are selling. As we act on your behalf, we are genuinely interested in your best interests when reviewing an existing portfolio, buying, selling, or managing your residential, commercial or industrial property.

#### *Property Advisory Services*

- Buyer Advocacy
- Seller Advocacy
- Property Management Services
- Property Solutions
- Property Finance
- Property Syndications

### ACCOUNTING, TAX & AUDIT SERVICES

Lachlan Partners' advisors provide a range of value adding accounting, tax & audit reporting services. Our services offer more than just compliance. They provide a perspective of the business not always apparent to those running the business no matter if you are privately or largely owned or in the government and not-for-profit sectors.

#### *Accounting, Tax & Audit Services*

- Compliance and statutory audits
- Risk assessment audits
- SMSFs statutory tax, accounting and audit compliance
- Due diligence and forensic accounting
- Tax consulting, tax restructuring and planning strategies
- Special purpose audits
- Internal audit services and internal control reviews

### PERSONAL & BUSINESS INSURANCE ADVISORY

Our advisors in this division specialise in structuring, maintaining and managing insurance protection plans for the firm's clients. We are passionate about helping ease the financial burden and worries for our clients in their time of need.

#### *Personal & Business Insurance Advisory Services*

- Identification of needs, creation of a Wealth Protection Plan
- Managing the process between the client and the insurer
- Group Insurance Policies for Medium to Large organisations
- Life Insurance and Total and Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance and Business Expenses
- Key Person
- Buy/Sell Agreements - Business succession

### BUSINESS ADVISORY

From tax planning strategies through to asset protection, our business advisors adopt a meticulous hands-on approach to help structure your business in the most efficient way possible. Size is not an issue. We deal with all types of business models on a daily basis from SMEs right through to large corporations. Lachlan Partners' advisors manage the taxation obligations for all types of clients from individuals to families, businesses and corporations. Our thorough understanding of the complexities of the Australian Taxation System means we can provide our clients with many effective tax strategies that show them areas where they can make practical savings.

#### *Business Advisory Services*

- Business advice including profit & loss and balance sheet analysis
- Establishing new business structures and business restructuring
- Tax compliance and advice for Income Tax and all ancillary taxes and levies
- Presentation of financial statements
- Business valuations & corporate finance
- Asset protection
- Succession planning
- Business planning