



MAKING CENTS OF MONEY

WEALTH SOLUTIONS



You work hard to get a little money behind you. So it makes sense to choose a wealth creation team who know how to make your dollars and cents grow, while still protecting your nest egg from the fluctuations of financial markets.

MGI has an established track record as a business growth advisor not just for growing businesses but also for people on the move. We provide sound solutions backed up by well-researched advice for managing the unique challenges of growing your personal wealth.

Confused and all at sea

When choosing the professional who you want to provide advice and grow your personal wealth there are important questions you need to have satisfactorily answered – is the person properly qualified; are they licensed; is their advice covered by professional indemnity insurance; do they belong to a relevant professional association and what are their charges; and; how are they remunerated?

Every member of MGI's wealth creation team can provide you with the appropriate answers to these serious questions. By selecting an MGI professional you can be confident in your choice and the advice given by your wealth creation partner.

Getting to know all about you

You want to know all about us and we also want to know all about you. We evaluate your lifetime goals and aspirations, your current asset portfolio and its protection, the legal management of your assets and your investment time frames.

All phases of the wealth creation cycle present their own set of financial challenges and opportunities. You will also have a list of financial and lifestyle goals which are unique to your particular circumstances. This means our investment advice needs to be tailored to your personal situation.

MGI's comprehensive client planning process enables us to provide you with individualised advice and the broadest possible spectrum of investment possibilities.

Risky business

With literally thousands of products available, MGI carefully selects best-of-breed solutions to ensure you have the highest probability of achieving your investment goals. We base our investment selections on detailed independent research.

As all MGI firms are independently-owned, we provide you with advice that is truly independent. This means your choice of investment products is not influenced by external parties – an important consideration in today's risky investment environment.

Advice for all your seasons

MGI develops investment solutions to best meet your individual requirements. Our recommendations and advice are focused on your needs, and may include superannuation and retirement

income alternatives such as self managed funds, allocated pensions, annuities, personal superannuation and rollovers or investments such as cash, fixed interest, property or share funds.

As superannuation planning is so important to your future lifestyle, it is vital to deal with experts. MGI has an established reputation not only as a business growth advisor but as a leading superannuation specialist. We can provide high level technical advice in all areas of superannuation, including tax effective strategies.

Once is never enough

We maintain regular contact with you, to ensure you are continually informed of market and economic developments. We also monitor the performance of your portfolio as well as regularly providing you with comprehensive reviews. These cover an in-depth performance analysis, discussion about rebalancing your investments if necessary, and any other advice appropriate to your investment goals. Regular updates on changes to your circumstances and objectives are also undertaken and incorporated into our advice.

And do you want fries with your investments?

Your investment strategies will also benefit from our holistic approach. We can advise you on the appropriate insurance cover to protect yourself from the impact of expected financial hardships. Income protection, trauma cover and life insurance may be viewed as necessary investment evils. But consider the impact on your family and their living standards if you are not properly insured.

Estate planning is another area where MGI can assist. Our advice on the appropriate tax structure for your assets as well as tax planning can eliminate, or at the very least, minimise the tax paid by your estate to the government.

MGI – Your Business Growth Advisor

For more information on how MGI provides business solutions that work for you contact your nearest MGI office or visit www.mgiaust.com