

Helping you achieve greater freedom to pursue your passions, to spend more time with those you love rather than oversee, think or worry about your money is what we do.

The essence of our philosophy – *to help you make smart choices about your money and enjoy great quality of life* – is the alignment of your financial choices behind what is most important to you; your values.

And that is the basis of this book which I am pleased to share with you.

As you will read, and to which my practice is grounded, financial advice is not based on an investment product, a percentage return or a quick tax fix. To the contrary, financial advice is based on clarifying what is important to you, clearly defining your outcomes and helping you align your choices with respect to investments, risks and tax through thoughtful and considered planning.

Your goals and outcomes give context to everything else. This way your plan is your platform and guide to help you choose and implement a course of action that is right for you.

What your plan means for you is unique.

The role of my team is to help you, along with all your advisers, to consistently implement your plan so that you completely organise and coordinate your family wealth. No matter what happens in markets, the economy or the world, as your trusted advisor, we help you achieve your goals.

With a sound plan in place, to witness clients achieve true wealth – more discretionary time – is tremendously satisfying professionally and personally and is why I am blessed to do the work I do.

By sharing this book with you, I hope you benefit from the ideas and concepts in it for yourself and those you care about.

Enjoy the journey!

## **Bret Ambrose**

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