

Silvan Ridge Financial Services

Life. A journey worth planning.

Financial advice for you

No matter what you want out of life,
Silvan Ridge Financial Services can
help you get there.



Our business

Silvan Ridge Financial Services was established in 1988 and provides financial planning advice to clients in Warrnambool and throughout Australia. We pride ourselves on customer service and our ability to offer a broad range of insurance and investment options.

Silvan Ridge invites you to take advantage of our obligation-free financial situation analysis. We work with you to structure the right financial strategy to meet your needs, for today and the future.

Our promise

At Silvan Ridge, our aim is to help you achieve financial success and peace of mind by providing you with a personalised financial strategy.

We strive to provide you with a plan that will create and protect your wealth over the long term, while dealing with your day to day financial needs and challenges.

We are committed to client service excellence and ongoing adviser education. All of our advisers are qualified, financial experts with the necessary experience to ensure the best financial outcome for you.

How we can help you

Whether it's to address a specific financial concern or to achieve your ambitions, we can help in areas such as:

- Guidance on budgeting and goal setting
- Savings and wealth creation strategies
- Investment planning
- Pre-retirement planning
- Retirement planning
- Superannuation planning
- Estate planning considerations
- Centrelink planning
- Risk and insurance analysis
- Business succession planning
- Salary packaging advice
- Gearing strategies



Our financial advice process

We look at your entire financial position, your needs and what you want to achieve in life before helping you plan how to get there. Then we guide you through a simple step-by-step process to create a financial plan just for you.

1 Understanding your goals At our first meeting we will discuss your current situation and life goals to understand how financial advice can benefit you.

2 Considering the opportunities & risks After understanding your circumstances, goals and attitude to risk, we will investigate the range of financial options available to help you reach your goals.

3 Building your financial strategy Based on our discussions and research we will present you with a customised financial plan that is written in plain English, which will set you on the path to where you want to be.

4 Bringing your plans to life We will work closely with you to implement your financial strategy step-by-step, so you can have as much control as you like, know where your money is going and why.

5 Staying on track with regular advice Your strategies will be reviewed annually and you will benefit from our ongoing support and advice. We will stay in touch, ensuring your plan stays up to date as your life changes.

Our ongoing commitment

It's difficult to predict if and when things may change, and even harder to keep up with frequently changing legislation and its implications. We provide ongoing advice and management of your strategy, including regular performance reporting, communication about investment markets and maintenance of your investment portfolio and insurance coverage.

Our door is always open

You can contact us at any time, particularly if things change. Our team is always available to talk with you.

Our people

Our advisers are fully qualified experts in personal finance and investment. We are committed to ongoing professional development and education to give you the most up to date technical knowledge and advice, specific to your needs. Our experience and specialist knowledge helps you make sense of all your options, so you can choose the best solution.

We observe a strict and comprehensive Code of Professional Conduct, and are subject to stringent compliance and audit guidelines.

Silvan Ridge Financial Services

Warrnambool

132A Lava Street
Warrnambool VIC 3280
T 03 5559 7111

Terang

72 High Street
Terang VIC 3264
T 03 5592 1969

Geelong

Carlyon
259 Latrobe Terrace
Geelong VIC 3220
T 03 5229 5966


Melbourne

Level 4
124 Exhibition Street
Melbourne VIC 3000
T 03 9650 4600

E admin@silvanridge.com.au

W www.silvanridge.com.au



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