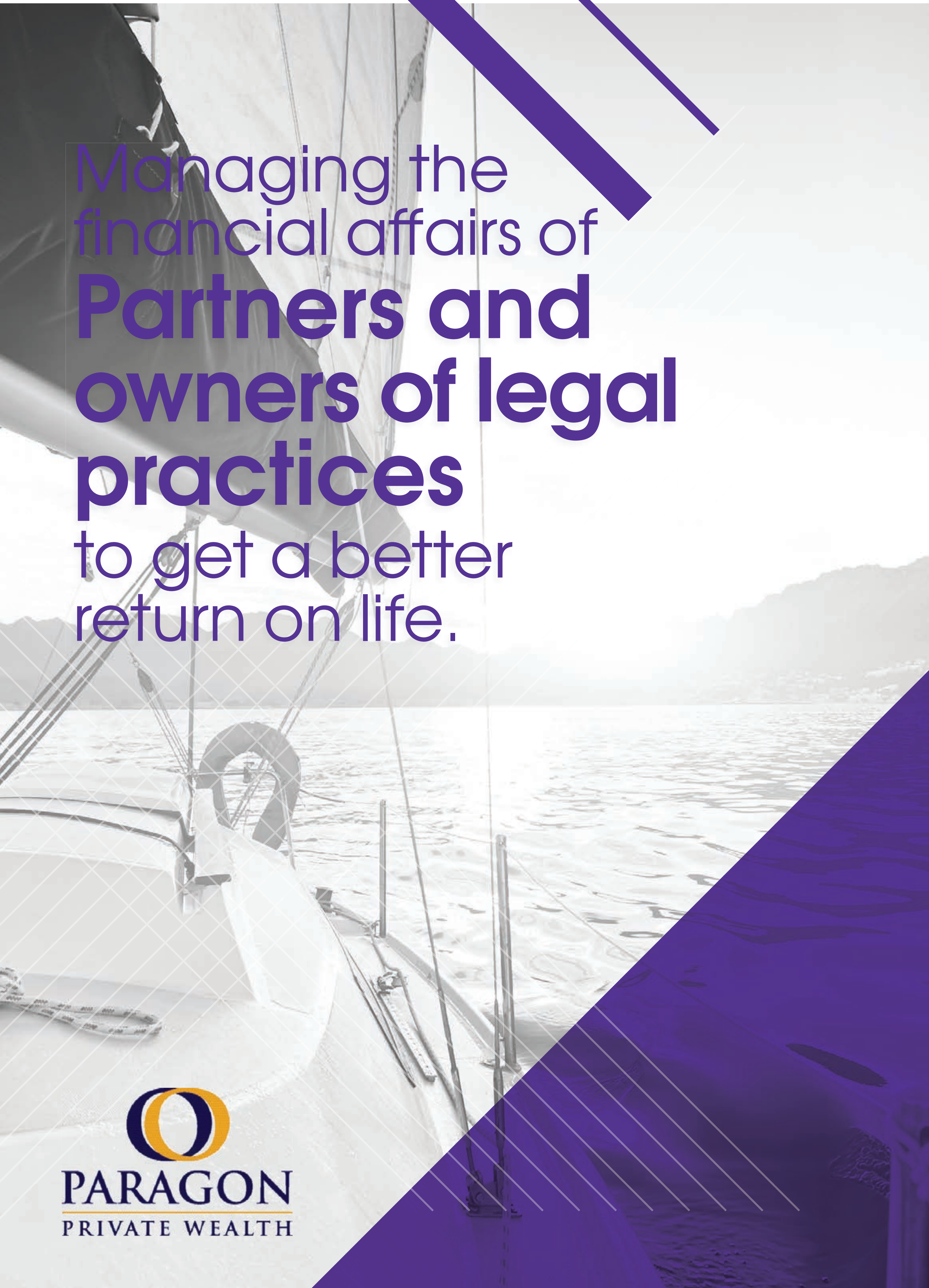
Managing the financial affairs of **Partners and owners of legal practices** to get a better return on life.



PARAGON
PRIVATE WEALTH

Judgement Day – find it in your financial favour

You know the smell of success having made Partner or acquired your own legal practice. You have taken on enormous responsibility, worked harder than you imagined and reaped handsome rewards for your efforts.

But could it all be a house of cards?

Have you prudently planned your financial affairs?

Is your house in order or could it all come crashing down when one of life's unexpected hurricanes blows your way?

You, more than anyone, know the impact of not having the right counsel on your team. It's time to take some advice of your own and overhaul your finances so you can lock down your assets, secure your future and comfortably enjoy the spoils of all your hard work.

At Paragon Private Wealth we specialise in working with Partners and owners of legal practices and understand the specific challenges you face when it comes to balancing the euphoria of your professional milestone and indulging in your lifestyle choices.

Do you:

- Struggle to spend within your means and have trouble managing a cash flow of irregular lump sums?
- Find that the harder you work, the greater your desire to spend? You are known to indulge in luxuries afforded by your financial success without considering the best way to fund them, structure them or own them.
- Fear the taxman? Tax is your biggest enemy however you don't have the time or know-how to investigate how to minimise your liability.
- Worry about your family and want assurances they will be looked after no matter what happens?
- Know the time has come to start seriously planning your long-term financial security but don't know where to start?

We understand that navigating the complexities of the financial system can be a logistical nightmare. Who seriously has the time (or expertise) to get it right? We do.

We demystify the process, providing you with financial security, reward for all your hard work and safeguards to protect your interests.

Working together to make it happen:

With a carefully constructed plan covering every aspect of your financial life, we give you the freedom to choose how you spend your time and hard-earned money, enabling you to make career and lifestyle decisions with confidence.

SHAPE YOUR LIFE
It's all about YOU

We help you clarify and prioritise what you want from life, and establish realistic expectations to assist you achieve your goals. We manage your erratic cash flow against your expenses, balancing the need to plan for the future without sacrificing all of the good things in life today.

PAY LESS TAX, LEGALLY
Tax Planning

You work hard for your money and it's important to minimise the amount of tax you legally have to pay. We keep you abreast of crucial tax developments affecting your financial affairs so you can keep more money in your pocket.

SUPERCHARGE YOUR SAVINGS
Investment Planning

We devise a disciplined investment plan specifically to fast-track your wealth creation. Without taking unnecessary risk, we examine all options, including shares, property and other asset classes.

COVER AGAINST CRISIS
Insurance

We put in place safeguards to shield you and your family against unexpected events that you think will never happen to you, such as accident, illness, unemployment or death.

MAKE DEBT WORK FOR YOU
Debt Management

We help you use smart borrowings (debt) to expedite your financial position and support your lifestyle and business decisions.

LEAVE YOUR LEGACY
Estate Planning

We capture your wishes in precisely worded estate planning documents to ensure your legacy and estate go to the people you choose.

RETIRE ON YOUR TERMS
Superannuation

The decisions you make with your money today affect your nest egg tomorrow. We guide you on how to increase your superannuation benefits and pay as little tax as necessary so your super lasts as long as possible.

PROTECTING YOUR ASSETS
Structure and asset ownership

We make sure everything you own is structured in the most tax-effective way and is protected from unforeseen risk.

You can do it alone, but do you really have the expertise, discipline and objectivity to gamble with your life savings?

Why Paragon Private Wealth?

While you are busy playing at the top of your career game, who is looking after your financial affairs? Think of us as your financial concierge, making it our mission to continuously augment your financial outlook, enabling you to make lifestyle decisions that reward you now and cater for your future.

We LISTEN and spend time UNDERSTANDING what is important to you and help you articulate your personal and financial goals.

We ADVISE and DISCUSS our recommendations in detail to ensure you fully UNDERSTAND what's involved.

We CLARIFY anything that is unclear and answer any questions you may have.

We provide OBJECTIVITY in helping you resolve the real issues, without haste or emotion.

We filter all available information to help you make INFORMED DECISIONS.

We take action, and expertly MANAGE your entire financial life on an ongoing basis.

We know that we can't be experts in all things so, if required, we will INTRODUCE and collaborate with other specialists.

We COMMUNICATE and maintain frequent contact. This includes meeting regularly to review your affairs and CONTACTING you when potential changes or opportunities arise.

We understand your time is precious and are here to help you MAKE THINGS HAPPEN.

You know that getting the right advice can be the difference between winning and losing. Practice what you preach and don't leave your finances in contempt.

Let's talk.

PARAGON
PRIVATE WEALTH

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