

DIY - Financial Health Check

- I have a financial plan and am on track to achieve my goals
- I have a written set of financial goals
- I understand how my assets are invested and am taking the right level of investment risk
- I have a documented budget and cashflow system
- My debts are appropriate good vs bad and competitive rates
- I am being active about wealth creation, utilising the key available strategies
- I am confident that I am managing my tax effectively
- I have adequate insurance cover to protect myself/my family
- I have an up to date will and beneficiary nominations
- I'm putting the right level of activity into my finances



How we can assist you

AGS provide financial advice and services to clients on:

- Financial planning
- Estate planning
- Retirement planning
- Superannuation
- Wealth management
- Wealth protection
- Mortgage advice
- Accounting services

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