PRESTIGE WEALTH MANAGEMENT
WEALTH BY DESIGN

Frequently Asked Questions

What does the first meeting involve?

The first step to achieving your financial freedom is to meet with Brendan McAllister to discuss your goals, aspirations and what you want your future to look like.

The first meeting is best had face to face, as it is a great opportunity for you to meet who you will be trusting with your financial future.

Education is something we take very seriously. Brendan will spend some time during your first meeting discussing what we do, why it works and educating you on our different philosophies. This is a great time to discuss your concerns, ideas and questions… and take home some real eye-opening information.

From here, we get to work behind the scenes to create a few different scenarios or strategies to improve your current situation. Ideally, we like to see you within three weeks of your first meeting to present these recommendations to you.

That's why it's always a good idea to book in your second meeting early on in the process to secure a time and date that fits in with school pick-ups, kids, work and everything in between.

You can do this during your meeting or by contacting Amanda or Georgia on (07) 5531 3644 or amanda@prestigewm.com.au and georgia@prestigewm.com.au

Your second meeting will be to discuss your personalised strategy, this is where you get to choose what scenario you are most comfortable with and discuss any lingering questions you might have.

Once you are one hundred percent happy with all of the information provided to you, we will meet with you one last time to welcome you go over your Statement of Advice and formally welcome you to the Prestige Wealth Management family.

How much will it cost me?

There are absolutely no fees or costs associated with your first meeting, this is completely free of charge. The costs of our subsequent advice will vary depending on the complexity of the advice, frequency of advice and the types of financial products recommended.

Any costs will be clearly outlined in your strategy and agreed upon on several occasions before we get to work building your wealth for the future.

Is there anything important I need to bring to my first meeting?

The focus of the first meeting with Brendan McAllister is to discuss your goals, aspirations and what you want to achieve in the future.

It is a good idea to think about some short term and long-term goals. These can be as simple as going on a holiday in three years' time or retiring in your mid-fifties.

Brendan, Amanda and Georgia will get to work in the background building a strategy which is centred around your goals and aspirations; it's important to have an idea before your first meeting what these will look like.

At your first meeting we will request a photo copy of your Drivers Licence or other form of Primary identification. This is purely for compliance purposes and will be stored in accordance with our Privacy Policy which you can find here.

Not sure about your goals?

We understand that your goals will continually change as the years progress, that's why we review you at least once a year to make sure your strategy is on track to achieve your goals, as they grow with you.

Preparing for your first meeting is about having a good understanding of your current situation, personally and financially.

Here are some questions to help you think some goals for NOW.

- Where do you want to live when you retire?
- When do you want to stop working?
- What does your current lifestyle look like? Is there anything you would like to change?
- What luxuries do you want to be able to afford?

If you have questions that remain un answered, please contact us directly on (07) 5531 3644