BRADFIELD PARTNERS
CHARTERED ACCOUNTANTS

FINANCIAL SERVICES

INVESTMENT ADVICE

Bradfield Partners holds its own Financial Services licence. We do not work on a product or commission basis. We believe this is important in providing appropriate advice and is what separates us from other Financial Planning practices.

As a client of Bradfield Partners or being referred by a client of Bradfield Partners you will be entitled to a free 30 minute consultation with Nick.

Advice on all major asset classes is provided to ensure a diversified approach is possible.

- Funds
- Shares
- Property
- Cash

PLANNING AND GOAL SETTING, BUDGETING AND CASHFLOWS

At Bradfield Partners we will help you create a financial strategy that is appropriate for you and helps you achieve your financial goals. Planning is a fundamental factor in creating wealth, and creating cashflow tables showing future financial positions are great motivators. Ask us for help!!

We believe every household should have a financial budget no matter how large or small the family income is. Knowledge of how the family income is spent and how it is to be allocated in the future brings with it more than just financial control.

Personal health, lifestyle and general happiness can be enhanced if appropriate financial planning and goal setting is in place.

LIFE INSURANCE - INSURING YOUR WEALTH (TPD, TRAUMA, INCOME PROTECTION)

We all know how expensive living in today's world is, and how insurance premiums are, quite frankly, something you'd rather not have to face. But in times of crisis, having adequate insurance cover really is something you cannot afford to be without.

At Bradfield Partners we believe that insurance needs should be specific to you, and should be regularly reviewed. Insurance should also be reviewed when major life changes occur.

Examples would be the purchase of a home, marriage, birth of a child, changes to employment and marriage breakdowns.

SUPERANNUATION - BUILDING AND GROWING YOUR SUPERANNUATION

It's not good enough to just have your contributions paid into an existing superannuation fund without any thought of the underlying investment "it is your money".

A superannuation fund needs planning, reviewing and amending during the course of your working life. Having control over the investments within your superannuation is a must!

Ask Nick today how you can be more pro-active with your superannuation.

RETIREMENT STRATEGIES - PLANNING FOR RETIREMENT

It may seem like a long way off, but it's never too early to start planning and implementing strategies to enable you to reach your retirement goals. Bradfield Partners can help you devise an effective strategy that helps you get the most from your money and keeps you on track for retirement.

Maximising tax and government benefits also needs to be considered at this time. Prior to retirement there are strategies such as transition to retirement that can be adopted. Ask us to help minimise tax and maximise government benefits.

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FINANCIAL SERVICES MEET THE STAFF

NICK BRADFIELD
BCom, CPA, FPS

Nick has been the Financial Services Director and long term trusted investment adviser to Bradfield Partners Chartered Accountants for over 10 years. Nick is a Financial Planner with both Accounting and Taxation qualifications. He is an expert in investment, superannuation, taxation and retirement advice. His wealth of knowledge and experience in long-term strategic investing is of the highest quality.

Nick's main focus is to be pro-active with regards to investments for his clients, making sure appropriate stocks, funds and other investment assets are used to match client's lifestyles and profiles as well as meeting their individual needs, goals and objectives.

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PAULA CHALMERS
Dip. FP

Paula joined Bradfield Partners in 2008. Paula has a keen interest in the Insurance and Superannuation dynamics of the Financial Services Industry. Paula has a diploma in financial planning. Her support and assistance to all Bradfield Partners clients is of the highest standard, making sure all clients get the most out of their superannuation.

Prior to working with Bradfield Partners Paula worked for Sykes Europe Ltd as a Client Account Manager and has gained considerable experience within the UK, Europe and the US.

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