Quality Financial Advice for all Australians

Merlin Money
Book your free virtual meeting today
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Our Client Engagement Philosophy

Your first meeting with us is obligation free. We'll use this time to explore your current situation, what you are trying to achieve and why it's important to you. Then, if you're happy to go ahead, we'll work with you to put your financial plan in place and support you to reach your goals.

We believe in ...

Establishing long-term trusted relationships.

We work to understand you and your goals, so that we can provide advice that you can trust. We'll educate you about opportunities that will help you to achieve those goals. And we'll be here to adjust your plan whenever your circumstances or plans change.

We take the time to know your situation, so you can trust our advice.

Providing understanding and transparency throughout the advice process.

We know that trust is built on a foundation of understanding and transparency, so we set expectations up-front and we're open with our advice fees. Just as you would with an accountant or solicitor, you pay us for the work we do and our fees reflect the complexity of your needs.

You will always understand what our advice fees are going to be.

Supporting our clients to feel in control of their financial situation.

If you're seeking answers to a single specific financial issue, we will tailor a strategy that directly addresses that need. Or we can build you a comprehensive, multi-faceted financial plan that evolves with you over time. We're here to do what you need.

You are always in control of the scope of the work we do for you.

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The value of our advice

The things most important to you

Goals and Objectives

Urgent Needs
- Cash flow
- Debts
- Insurance
- Estate planning
- Changes in life
- Investments

Opportunities
- Legislation
- Product
- Tax (salary sacrifice, gearing)

Future Planning
- Modelling projections
- Tracking achievement of goals
- Portfolio construction

Investor Behaviour
- Stop you from making big mistakes
- Discipline and accountability

Execution of the Plan
- Client commitment
- Adviser commitment
- Ongoing relationship

Value
- Trust
- Understanding
- Control

The advice process

Understanding your goals	Design your financial strategy	Presenting your financial strategy	Bringing your plans to life	Staying on track with regular advice
At our first meeting we will discuss your current situation, what you are trying to achieve and why it's important to you. We will then be able to discuss the range of financial options available to help you reach your goals.	Understanding your circumstances, goals and attitude to risk we will research and analyse different financial strategies to find the ones that are right for you. We then put together a financial plan that details our recommendations.	Based on our discussions and research we will present you with a customised financial plan which will set you on the path to where you want to be.	We will work closely with you to implement your financial strategy step by step, and liaise with providers, technical experts and other professionals on your behalf.	We will stay in touch, ensuring your plan stays up to date as your life changes. Your strategies will be reviewed annually and you will benefit from our ongoing support and advice.

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