



## WHO ARE WE?

### SPECIALIST ADVICE TAILORED SOLUTIONS RELATIONSHIP FOCUSED

At Prime Advisory, we're with you all the way.



**ESTABLISHED IN 2007** to provide a full service offer to business owners, individuals and SMSF Trustees, the Prime Advisory vision is to meet the financial needs of our clients and keep their financial affairs on track.



**OUR TEAM** of specialist advisors provides proactive, actionable advice for all aspects of your financial life. From traditional accounting and tax services to sophisticated wealth, lending and business advisory strategies.



**WE BUILD LONG TERM RELATIONSHIPS** with clients seeking to improve their financial futures. Our OnTrack™ programs provide advice and strategies that will keep you engaged with your finances and help you get to where you want to be.



## WE PROVIDE EXPERT ADVICE AND INNOVATIVE SOLUTIONS IN:



ACCOUNTING AND TAX



BUSINESS ADVISORY



FINANCIAL PLANNING



SELF-MANAGED  
SUPERANNUATION



PERSONAL INSURANCE



LENDING

## OUR SERVICES



We offer a comprehensive range of advisory services to businesses and individuals wanting to take more control of their financial lives. Our unique Ontrack™ programs combine specialist advice, real time reporting and a relationship with us as your advisors to deliver tailored strategies that will help you to meet your goals.

BUSINESS ONTRACK™

FINANCIALLY ONTRACK™

LENDING ONTRACK™

SMSF ONTRACK™

# OUR ONTRACK PROGRAMS



## BUSINESS ONTRACK™

This program supports business owners to think strategically and create a business that performs just the way they want it to.

## FINANCIALLY ONTRACK™

This program helps individuals to create a personal financial strategy to achieve your financial and lifestyle goals.

## LENDING ONTRACK™

This program takes the stress out of lending – we source the most suitable products to meet your needs and take care of all the paperwork.

## SMSF ONTRACK™

This program allows you to take control of your superannuation in a way that you never have before.



If you're not quite ready for one of our OnTrack™ packages but need support with meeting your tax obligations, we can take care of that as well.

## OUR APPROACH

We're passionate about understanding where you are on your journey, being clear on your goals, partnering with you to create the right strategy, and keeping you on track with regular catchups along the way.

**ON THE SAME PAGE:** First, we ensure that we understand your goals and objectives, and how we can work together to help you to achieve them.

**CLEAR ON THE NUMBERS:** Knowing your numbers is critical. We'll gather your financial information, ensure it's accurate and ask the right questions to ensure we fully understand your current position.

**MAKE SENSE OF THE NUMBERS:** The numbers are a result of your past decisions and the basis of your future opportunities. Interpreting the numbers allows us to develop the strategies that will get you to where you want to be.

**AGREE ON THE PLAN:** We'll explain potential opportunities and strategies, commit to a course of action, and agree areas of focus for the short, medium and long term.

**KEEP YOU ON TRACK:** We'll check in with you regularly to see how you're tracking towards your goals, and tweak your strategy accordingly.



## YOUR NEXT STEPS

▶▶▶▶ **CALL US ON 02 9415 1511**

Lets discuss how Prime Advisory can transform your financial life. Call us to book a complimentary appointment with one of our advisors today.

[PRIMEADVISORY.COM.AU](http://PRIMEADVISORY.COM.AU)