



CASE STUDY - The Power of Planning

Geoff and Angela were in their mid 50's. Both their children were now finished with higher education and their thoughts were finally turning to themselves.

Like many successful couples they had devoted their energies to ensuring their children received the best possible education and start in life. Now, with more time to think about their own future they had a number of questions. When could they retire? How would they spend their time? What would they be able to afford to do?

With over 250 years of banking, financial planning and investment experience, Kubera Wealth focus on the long term with our clients. We invest the time to understand our clients life goals and creating solutions to meet their needs. Our business is to provide clarity and peace of mind over our clients financial future.

When Geoff and Angela's best friends recommended them to Kubera Wealth, the first thing we did was to take them through our Wisewealth® process. This unique, trademarked, process helped them to identify what mattered most, visualise the life they wanted to live and created their personalised strategic financial plan.

Shortly after the plan was finalised and the recommendations implemented Geoff and Angela were able to retire. They are now safe in the knowledge their finances would be able to support their desire lifestyle and that Kubera Wealth is always at hand to review and advise.

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We are delighted that we have been able to help our daughter buy her first home confident that our finances and retirement plans are now in good hands. The process was a lot easier than we imaged and we are delighted with our new relationships

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*Private Client referred by
Family Lawyer*

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