THRIVE
financial

The Client Experience

It changes perspective and mindset - it gives strength.

The work we do empowers people to move confidently and live generously.

Need a personalised financial roadmap, made just for you?

Really understanding your unique financial goals, circumstances, and aspirations is essential to providing advice that fits.

Together, we'll develop a personalised roadmap, tailored to your specific needs.

We'll clarify and define your short and long-term objectives; then help
you kick the goals needed to get you where you want to go.

Expert Guidance

Our extensive knowledge of:

Financial Markets

Tax and estate planning strategies

Superannuation rules

Wealth Protection

Investment strategies

- Means we're well positioned to provide expert guidance and advice.
- We stay up to date with the latest trends to ensure you benefit from the most effective financial planning strategies.

The Trustee for The Yurko Family Trust T/A Thrive Financial Planning | ABN 80 346 511 003 Corporate Authorised Representative 000449875 Beryllium Advisers Pty Ltd | ABN 30 646 510 769 | AFSL 528250

Tax Planning

You don't want to pay tax you don't need to, do you? We don't want that for you either.

We regularly help clients implement strategies to improve their overall tax outcomes.

This type of planning will often include carefully considered advice on superannuation contributions, retirement income streams and multiple other tax effective structures.

Investment Planning

Whether you're planning for retirement, funding your children's education or generally accumulating wealth, we develop customised investment portfolios that align with your objectives.

We'll help you make informed investment decisions by analysing your risk tolerance, investment goals and time horizon.

Risk Management Strategies

Safeguarding your financial future matters. With years of managing claims for people just like you, we understand how essential this is to get right.

Our personal insurance (Life, TPD, Trauma and Income Protection) advice risk management strategies are individually tailored, to protect what matters to you.

We provide peace of mind, so you can sleep better ta night, knowing your finances are well-protected.

Ongoing Monitoring and Adjustments

Financial planning is not a one-time event, but an ongoing process.

We monitor your financial plan, your investment portfolio, and changing market conditions to stay on track with the end game in mind, always.

We provide regular updates and recommendations, adjusting as necessary to keep your financial plan aligned with your evolving financial goals.

Education and Empowerment

This is your future. You should be calling the shots. Work with us so you feel empowered to make informed financial decisions.

We've got your back, with educational resources, workshops, and seminars to enhance your financial literacy.

Transparent and Ethical Approach

We uphold the highest standards of transparency and ethics in the services we provide.

We are duly bound to always act in our clients' best interests, and this is a responsibility we approach with absolute seriousness.

How we show up for you matters.

***This document may contain general advice and does not take into account your objectives, financial situation or needs. You should consider whether the advice is suitable for you and your personal circumstances. Before you make any decision about whether to acquire a certain product, you should obtain and read the relevant product disclosure statement. Should you require personal advice, we encourage you to contact our team.**

Creating Financial Freedom

Simple.

Rachael Yurko

Authorised Representative

336473 0432 067 181

rachael@thrivefinancial.com.au

www.thrivefinancial.com.au