Capital Partners

LIFE CONVERSATIONS. WEALTH SOLUTIONS

“The solution often turns out more beautiful than the puzzle.”

RICHARD DAWKINS

Create your Wealth Map.

And enjoy wealth with purpose.

Unscramble your nest egg.

How to hatch a bold new life plan.

Navigate a world of wealth building opportunities. With clarity and certainty. With confidence and purpose.

Creating wealth is important. Wealth enables you to do the things you want in life. But unless it's built and managed with purpose, all the money in the world won't help you live a richer, happier life.

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ENJOY
LIVE

This is what inspired us to create Capital Partners in 1999. It's what sets our team, solutions and the results we achieve for our clients apart. Instead of simply focusing on the numbers, like so many financial advisers and wealth management firms, we focus on you.

Your family. Your values. Your life. Your goals.

We help you to live the life you want. Your best life. At every stage. In every aspect.

Relax in the knowledge we've got your back.

As a privately-owned business, we're a bit different to our peers. Good different. And not just because our wealth solutions revolve around your life goals, rather than some aimless scramble to amass wealth at all costs.

Privately owned.

We have our own Australian Financial Services licence, therefore we are free to explore and exploit a world of investments and opportunities on your behalf.

Fee-based guidance.

No bank or institutional affiliations. No vested interests. We don't rely on investment commissions.
We work for – and with – you and your family.

Evidence-based advice.

We draw on the best academic research and Nobel Prize winning thinking to create a tailor-made wealth solution that puts your mind at ease and a smile on your face.

CEFEX and GAIA accredited.

We meet the highest global fiduciary standards with the Centre for Fiduciary Excellence and the Global Association of Independent Advisors™. You can relax knowing our interests are aligned with yours.*

**Despite our membership with GAIA, Capital Partners does not claim to be independent under section 923 of the Corporations Act.*

Our principles

Put clients first, always.

Earn trust, be ethical.

Invest based on evidence, not speculation.

Invest to a fiduciary standard.

Collaborate to succeed.

Think sustainably, think long term.

Drive success on purpose – yours and ours.

Look at the big wealth-management picture. We do.

All of our clients are like you. Unique. They have different life goals and are on very different life journeys, and yet they have a number of things in common: successful careers, successful businesses and, as the research into successful families tells us, the same key concerns about money:

01.

Making smart decisions with their money.

02.

Building wealth through forward thinking, particularly by managing tax.

03.

Looking after their family – providing security and certainty.

04.

Protecting assets from erosion and claim.

05.

Making a difference in the community and the world.

And so, we've structured our business, our intergenerational team and our whole-of-life approach to address these concerns. We help you get your entire financial house in order and keep it that way, ensuring every decision you make is aligned with your deepest values and your most important goals.

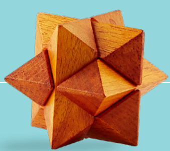
Wealth mapping

Strategic wealth planning

Investment management

Legacy planning

Risk and insurance



Discover and define your purpose. Create your Wealth Map.

No two Capital Partners' clients or solutions are the same, but every client journey starts with our proprietary Wealth Map discovery session.

This isn't a conversation about wealth management or investments or legacy planning. We'll get to that in good time. Your Wealth Map is about enabling us – and quite possibly you – to discover what really matters in your life.

Your priorities. Your passions. Your values. Your goals. Your purpose.

After all, how can we help you live a full and happy life if we don't know – or if you don't know – what your best life looks like? How can we help you navigate a world of financial products if we don't know where you are, where you're heading, and why?

Map your way forward.

"When your values are clear, your decisions are easy."

ROY DISNEY
(WALT'S BROTHER)

Get a wealth planning strategy that makes sense.

Next, we'll create a flexible, comprehensive wealth strategy – a step-by-step plan of everything you need to do to optimise your position and get the most from your financial resources.

We'll take everything into account. Cash flow. Debt management. Tax. Asset protection. Superannuation. Retirement planning.

We'll leave no stone unturned and give you access to all the subject-matter experts you need within our multidisciplinary team. Providing the support, insights and confidence you need to get on and stay on the right path. And we'll be there for you through all life's ups and downs.

Give yourself the time, confidence and freedom to enjoy the things in life that matter most to you.

Make your wealth work harder. Make the investment market work for you.

Forget the fickle and futile art of trying to pick the next big stock or trend. Decades of academic research tells us the key to long-term success is investing strategically, scientifically and with forensic attention to detail.

This is the philosophy that underpins our asset-class investment methodology.

Our Investment Committee draws on Nobel Prize winning thinking to structure and manage your personalised investment portfolio to capture the key dimensions driving investment returns.

We then employ patience and discipline to maximise your returns, minimise your risk and tax exposure, and preserve your gains, all with your life goals firmly in mind.

"If you are having fun investing, you are probably not doing a very good job. Good investing should be boring."

LEGENDARY INVESTOR
GEORGE SOROS

Get a watertight legacy plan. Then get on with enjoying life.

You want to leave your family with fond memories, not confusion and conflict. You want to be able to enjoy life with your family, without worrying about the future. That's why legacy planning is such an important part of our whole-of-life approach to financial planning.

From the intricacies of family estate planning and formalising wills, trusts, powers of attorney and guardianship, through to business succession planning, our legacy planning experts and partners will help you create an estate plan that puts your wishes, best interests and legacy first.

And if you want to leave a legacy that extends beyond your family, we can help you maximise your impact, whether you want to set up a charitable trust, make a bequest to a charity or create the time and freedom in your life to volunteer.

We all want to be remembered fondly, for doing the right thing, not for leaving a mess behind.

Stop focusing on what-ifs and doubting your insurance plan. Start focusing on what's next in life.

Everything we do is designed to ensure you live your best life. Managing and mitigating risk and worry is a big part of that. You can't enjoy life today if you're fretting about the future.

We apply the same logical, personal, evidence-based ethos to insurance as we do to every area of financial planning. We'll discuss, demystify and draw on our never-ending research into underwriters, products and premiums to decipher the jargon and small print for you.

The end result is peace of mind for you. You'll know you have the personal and business policies, not just based on price, but on which underwriters and products will be easier to work with in a worst-case scenario. After all, insurance is about alleviating emotional stress, as well as financial stress.

The first steps in a lifelong journey.

From your Wealth Map to defining your strategy to implementing your individually tailored wealth, investment and legacy solutions, we'll walk you through every stage of the process.

And rest assured, it's a lifetime commitment from our team. We'll be there every step of the way, recalibrating your strategy and realigning your solutions to meet your changing needs.

Wealth Map Discovery Meeting.

Defining your values, goals and purpose.

Strategy Overview & Proposal Meeting.

Outlining proposed solutions, fees and timeframes.

Implementation Meeting.

Finalising your step-by-step plan and all necessary paperwork.

Initial Progress Meeting.

Dotting the i's, crossing the t's and checking progress to date.

Regular progress meetings.

Checking in two, three or more times a year, depending on the complexity of your affairs.

Bringing it all together.

Many of us live busy, complicated lives. Finding the time to stay on top of our finances and future planning often gets left on the to-do list.

Working with a small community of clients – successful individuals and families from all walks of life – affords us the opportunity to really understand and stay on top of your financial issues, and to meet with you as often as necessary.

Our senior people have well developed specialist practice areas and we have deep professional networks, enabling us to assist in resolving even the most complex situations.

But ultimately, our measure of success is when we have taken away the burden that comes with financial decision making and the day-to-day management of your money. Your financial house will be in order, and you will have a committed and passionate team working on your behalf.

We'll move you from complexity to clarity, and from concern to confidence in the future.

A typical client?

There isn't one. But our clients generally have investable assets of $1 million or more, or have significant personal or business income and are committed to building their wealth over time.

Move forward with clarity, certainty and confidence.

Life is complex. Your financial life is even more so, especially with so many financial options and investment opportunities to choose from.

Take uncertainty out of the equation and tap into the wealth of specialist expertise within our team spanning the wealth planning, investment management, estate planning and insurance spectrum.

To find out more about building your best life and creating wealth with purpose, please call us on **+61 8 6163 6100**. Alternatively, email us at **wealthmatters@capital-partners.com.au.**

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