ARMADA
FINANCIAL PLANNING
asset growth

Financial Planning should have one person's interests at heart - yours.

Our Financial Planners and Strategists take time to research and understand your financial situation, risk profile and personal plan, from now until retirement.

ARMADA.COM.AU

ASSET GROWTH

Armada Financial Planners focus on individual goals and values, providing you with an honest and professional service tailored to your financial needs.

Our consultants pride themselves on being a financial advisory firm with a commitment to improving the quality of life of our clients by fulfilling their financial objectives.

As we work with you to organise your financial affairs, create and protect capital, and achieve your desired lifestyle choices, our recommendations are always underpinned by exhaustive and professionally conducted research.

We work closely with your Accountants to ensure a smooth delivery of your financial goals.

We source leading research organisations for market assessment, technical analysis and practical techniques as an important component in providing the very best financial strategies.

WE CAN HELP WITH

- **Understanding the GAP of what you need when you retire**
- **What actions you need to take**
- **What rate of return you need to achieve your goals**
- **The level of investment risk appropriate for your stage of life**

WHAT WE DO

ARMADA
FINANCIAL PLANNING
asset growth

We provide advice to individuals, business owners, companies and superannuation trustees on:

- Financial Management
- Investment Management
- Aged Care
- Risk Management
- Superannuation Advice
- Insurance

We seek to understand your situation, you goals and your experience with finances in order to be able to properly advise you on:

SUPERANNUATION

We can help you navigate through the myriad of options to make sure your Super Fund is the right fit for your your particular circumstances. We then help with ongoing management for contribution, pension, rollovers and investments.

RETIREMENT PLANNING

At Armada we believe that planning is absolutely crucial to a successful retirement. We will help you with your Super, Account Based Pensions, financial modelling, centrelink entitlements and budget planning.

INVESTMENT MANAGEMENT

We help you make investment decisions for your different structures and review the performance to ensure your returns are maximised depending on your risk profile and current market conditions.

PERSONAL INSURANCE

By exhaustive and professionally conducted research with our comprehensive knowledge and expertise of insurance we aim to give you the best possible life, income and critical illness insurance that suits your needs.

STRATEGIC PLANNING

We provide ongoing advice in the most appropriate structures to manage your wealth. In conjunction with your Accountant, we aim to build a platform to grow and protect your wealth.

CENTRELINK

We can assist with the application process, review your benefits and discuss strategies relevant to your financial circumstances.

AGED CARE

We provide strategic advice on funding options for both the upfront and ongoing costs of Aged Care.

NEIL HANCY

neilh@armada.com.au

Neil is a Director of Financial Planning at Armada Accountants & Advisors with over 25 years' experience in the Financial Services Industry.

Neil joined the team in 2004 to head up the Financial Planning division. As a professional, Neil has experience in life insurance, superannuation, investment and account based pension strategies.

Neil has a Degree in Bachelor of Business, is a Certified Financial Planner and a member of the Financial Planning Association of Australia.

Neil is a life member of the Melville Cricket Club and enjoys spending time with his wife and 3 young children. He also manages a Little Athletics Club.

MIKE BERRY

mikeb@armada.com.au

Mike has been involved in the Financial Planning industry since 1999, and has helped a variety of clients organise their financial lives.

Mike joined the team in 2013, and has brought in experience in superannuation, insurance (personal and business) and investment (cash, shares, property) strategies.

Mike enjoys providing trusting advice to clients to help achieve their financial and lifestyle goals.

Mike has a Bachelor of Commerce, is a Certified Financial Planner and is a member of the Financial Planning Association of Australia.

Mike is married with 3 children. His weekends are busy ferrying kids around to various sporting activities and playing hockey and touch rugby.

LINDSAY BYRNE

lindsayb@armada.com.au

Lindsay is a Senior Financial Planner at Armada and has over 20 years of experience in assisting clients to achieve their financial goals.

Lindsay provides advice across all areas of Financial Planning to a wide range of clients from retirees facing the ever changing regulatory, investment and Centrelink environment to pre-retirees meeting their primary financial goals for wealth accumulation and debt reduction asset protection strategies.

Lindsay has a extensive experience in advising clients utilising a Self-Managed Super Funds (SMSF) to assist with their compliance, investment, estate planning and other strategic planning areas.

As a highly technically proficient and experienced adviser with a strong client focused manner, Lindsay understands each client's goal are unique and can provide the necessary tools to achieve positive outcomes.

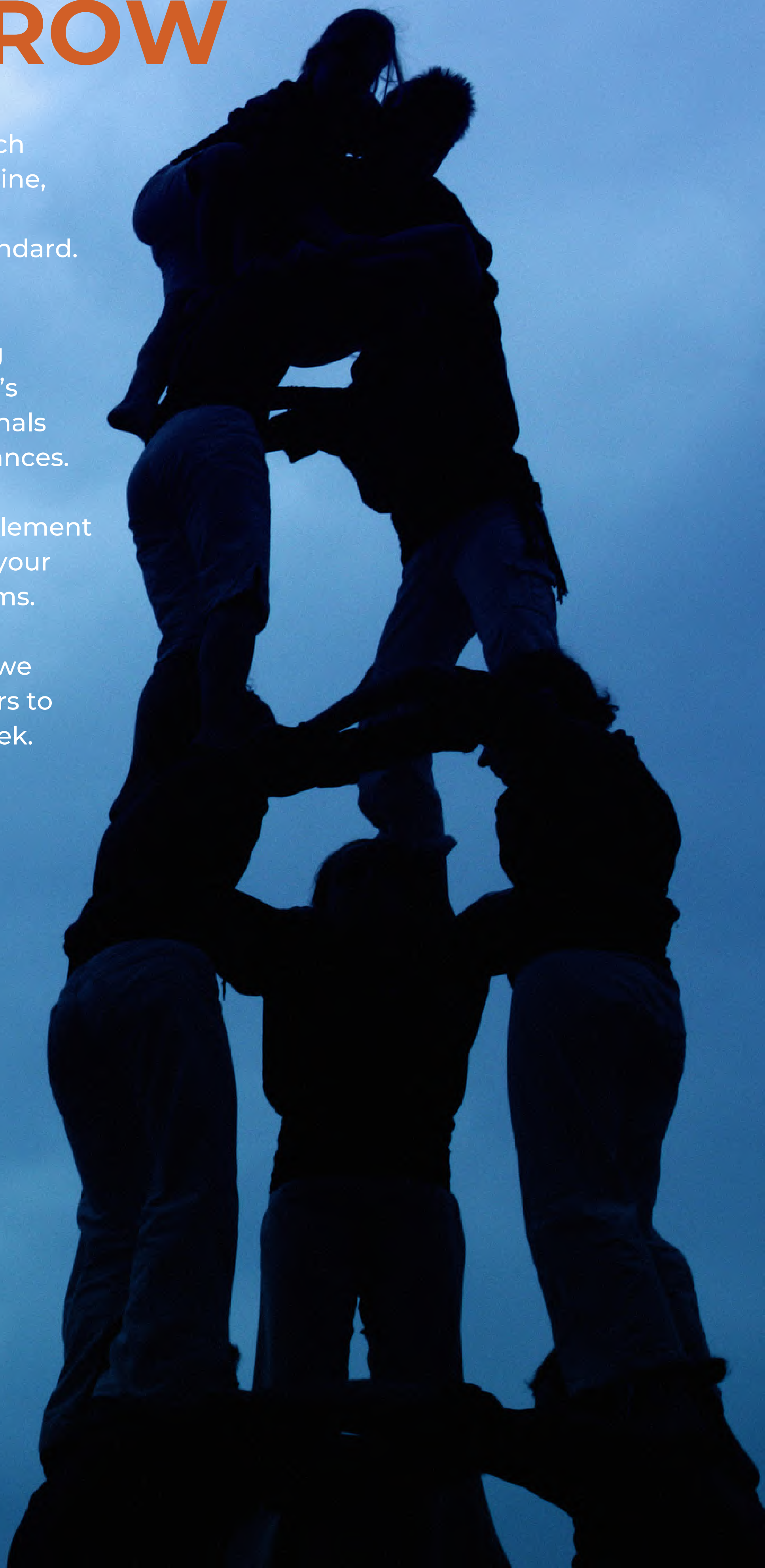
GROW YOUR TOMORROW

We are a team of people, each specialists in our own discipline, working together to deliver outcomes of the highest standard.

For individuals, businesses, or corporate entities seeking investment models, Armada's team of dedicated professionals proactively simplify your finances.

We help you devise and implement strategies to help you grow your future and realise your dreams.

Armada Financial Planners, we have the strength in numbers to deliver the outcomes you seek.



ARMADA
FINANCIAL PLANNING
asset growth

P (08) 6165 4000 **F** (08) 6165 4057
E fp@armada.com.au
A 18 Sangiorgio Court Osborne Park WA 6017
P Locked Bag 4, Osborne Park DC WA 6916

ARMADA.COM.AU