



## 40-50 YRS

### *Investing in Your Future*

In our 40s and 50s, many of us have established careers and have a little more disposable income for investing than we did in our 20s and 30s. We have young children or kids heading off to college. And, we may be working at paying down our first mortgage, or even thinking of taking on a second mortgage with property investment.

There are so many factors during this stage, so it's important to have a plan in place to ensure that bright future we've been working so hard to create. This is a time for focusing on wealth-building, but it's also a time to evaluate your investment strategy and your risk profile to ensure you're on track to having enough for retirement.

We can help you with:

- Saving for retirement and investing in superannuation
- Ensuring your investment strategy is aligned with your current financial goals
- Identifying tax strategies to help you save money
- Creating an investment income stream through property or other investments
- Protecting your family's lifestyle in the event of your death, or if you become ill or injured and can no longer work

When you sit down with one of our experienced financial planners, we'll work together to answer the big questions at this stage. We'll develop a plan and ensure your investments suit your investment goals, timeframe, and risk tolerance. You still have years before retirement but smart, practical investing now – tailored to your objectives – can give you more options as you near your golden years, and more peace of mind now.

To learn more about how we can help you invest in your future.

**For more information please contact us on**

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