Spectrum Wealth Partners

Located in Sydney's CBD, Spectrum Wealth Partners is an integrative practice, mindful of all aspects of your financial life.

Whether you are a first home buyer, a seasoned property investor, a time-poor professional or a small-to-medium business owner with significant wealth and assets but not enough hours in the day to manage them. Spectrum Wealth Partners are your trusted advisors, we can help you navigate the complexities of your financial life – both your business and personal affairs. Likewise, retirees and those contemplating the transition, call on Spectrum Wealth Partners to help guide their decision making around protecting, preserving and growing their income stream beyond employment.

SWP Advisory

Successful businesses require expertise that is multi-faceted, SWP Advisory provides business advice driven by comprehensive tax and accounting services, effective cashflow management and asset protection strategies.

SWP Capital

Lending provided by SWP Capital Group completes our service offering for individuals and business owners. We offer mortgage and finance broking for businesses and individuals, as well as asset financing, retail and commercial finance, and residential mortgages.

Covering the entire Spectrum

Wherever you find yourself in your professional and personal life, Spectrum Wealth Partners takes an overarching view of your entire financial position. From there, we structure customised financial solutions that endeavour to access and leverage efficiencies for your time, your wealth and your future opportunities.

Our Services

As our name suggests, we are dedicated to delivering an integrated service that reflects the full spectrum of our clients' financial lives. Our services include:

- **Financial Planning & Wealth Creation Strategies, via Spectrum Wealth Partners**

We provide tailored retirement planning and wealth creation strategies to ensure you make the most of your investments, including effective budgeting, asset and debt management. We also help you identify risk exposures, and develop a cost-effective risk management and insurance strategy. We help optimise your superannuation, and work with you to explore SMSF structures as a means for more control over your investments.

- **Taxation & Compliance, via SWP Advisory**

Close consultation, comprehensive planning and accurate reporting that results in effective tax cost management is fundamental to our service. We provide individual tax, business tax and accounting and book keeping services.

- **Business Advice, via SWP Advisory**

Providing expertise and superior business advice we assist start-ups, SMEs and corporates to implement appropriate and effective business management and growth strategies. This may include cashflow strategies, succession planning, asset protection, and managing the compliance requirements of doing business internationally. We deal with complexity to deliver practical and effective outcomes for our business clients.

- **Lending Strategies, via SWP Capital Group**

We offer assistance with retail lending, commercial lending, asset financing and residential mortgages.

Financial Planning

We aim to empower clients to make informed decisions. Accustomed to opening up meaningful exchanges that cut through technical language in favour of straight talk that really resonates, we help clients identify and articulate their aspirations. From there, we craft personalised financial plans designed to achieve those goals. In short, our approach is transparent and responsive to a client's specific set of circumstances.

This style of service is underpinned by our core values:

- **Client-first service** – we prioritise our clients' needs and build enduring relationships designed to support them throughout the life of their financial journey
- **Integrity** – transparency and honesty form the foundation of our practice
- **Excellence** – dedicated and determined, we always strive to be at the top of our game; our holistic approach demands we research, collaborate and customise financial plans that reflect the full spectrum of our clients' financial lives
- **Leadership** – clients enjoy one-on-one financial mentoring designed to help them take control of their long-term financial wellbeing
- **Innovation** – we search for out-of-the-box solutions designed to unlock opportunities and harness greater efficiencies

About Us

Spectrum Wealth Partners' Principal Financial Adviser, Ashley Tilston, has significant tenure within the financial services sector. Over a 15 year period, he was employed by two of the nation's largest banks - culminating in a role as a Senior Financial Planner.

Further, Spectrum Wealth Partners holds its own Australian Financial Services Licence and enjoys the freedom to operate unencumbered by institutional allegiances.

About You

We offer enduring financial planning services. Consequently, our clients range in age and circumstance; from young home buyers embarking on their first property purchase. Through to more established seasoned portfolios.

Indeed, individuals and couples of high net worth call on Spectrum Wealth Partners to help navigate the complexities surrounding the intersection of their personal and professional finances. Similarly, time-poor business executives, professionals and the self-employed entrust Spectrum Wealth Partners to help inform their decision making. For those contemplating retirement, or those who have already made the transition, Spectrum Wealth Partners is well placed to tailor a personalised retirement solution specific to their goals and aspirations beyond employment.

SPECTRUM WEALTH
• PARTNERS PTY LTD •

Level 33, Australia Square
264 George St, Sydney NSW 2000
PO Box R63 • Royal Exchange NSW 1225
P. 02 9258 1295
E. ashley@spectrumwp.com.au
W. spectrumwealthpartners.com.au