

Investment

Make sure your investment strategy has your best interests at heart.

In this day and age, there are an almost overwhelming number of options when it comes to investing. We aim to simplify the investment process for you and help you choose the most beneficial investment portfolio for your financial goals.

Our Investment Services



Risk Assessment

Evaluation of your risk tolerance to determine the best types of investments for you.

Asset Allocation

Implementation of an investment strategy that looks to balance different types of assets based on your risk assessment.

Managed Funds

An Investment strategy whereby you invest into an existing fund that is run on your behalf by an investment manager.

Superannuation Investments

Make the most of your investment options in one of the most tax effective investment vehicles.

Gearing Strategies

Discover the most effective ways to borrow money for investments.

How we can help you

At Nexia we aim to build a strong relationship based on trust so you can sleep easy knowing we have your best interests at heart.

Whilst everyone will have a different investment strategy based on their distinct needs, the ultimate objective for investing remains the same; to get the most tax effective, highest rate of return in alignment with your risk profile. We work hard to stay on top of market conditions and advise you on the best course of action for your unique circumstances.

Our team is committed to joining you on your financial journey. We evaluate your lifetime goals and aspirations, your current asset portfolio and its protection, the legal management of your assets and your investment timeframes.

Interested in talking to us?

Please contact one of our financial advisers to organise a complimentary consultation to discuss your investment needs.



Craig Wilford

Partner - Authorised Representative
Certified Financial Planner
Nexia Sydney Financial Solutions Pty Ltd



Sylvia Liang

Partner - Authorised Representative
Certified Financial Planner
Nexia Sydney Financial Solutions Pty Ltd



Christine Atencia

Authorised Representative
Certified Financial Planner
Nexia Sydney Financial Solutions Pty Ltd

Nexia Sydney Financial Solutions

Level 16, 1 Market Street, Sydney NSW 2000

PO Box H195, Sydney NSW 1215

t +61 2 9251 4600

f +61 2 9251 7138

info@nexiasydney.com.au

www.nexia.com.au

