Wealth Accumulation

We can help to make your hard earned dollars grow, while still protecting your nest egg from the fluctuations.

You work hard to earn your money so it stands to reason that you want your money to work just as hard for you.

Wealth accumulation is the first real step in your financial planning journey; a phase in which you are trying to amass your wealth by getting the most out of your investments.

The key to successful wealth accumulation is effective planning. By undertaking an in-depth financial health check and working closely with a financial adviser to ascertain an effective plan for your lifestyle and wealth goals, you can start to develop the right Portfolio of investments best suited for you.

Our Wealth Accumulation Services

Financial Plan Management

We work with you to assess your current financial health, establish achievable financial and personal goals, along with developing a realistic, comprehensive plan to meet these goals.

Investment Strategies

We can help you select the most appropriate investments for your financial and taxation objectives.

- Asset allocation
- Risk assessment
- Managed funds
- Superannuation investments
- Gearing strategies

Superannuation

We work with you to identify and tailor superannuation strategies to optimise your tax concessions and wealth accumulation goals.

How we can help you

Nexia has an established track record as a solutions focused firm. We provide sound solutions backed up by well researched advice for managing the unique challenges of growing your personal wealth.

All phases of the wealth creation cycle present their own set of financial challenges and opportunities. Nexia's comprehensive client planning process enables us to provide you with individualised advice and the broadest possible spectrum of investment possibilities.

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 time-frames.

Nexia Australia

Interested in talking to us?

Please contact one of our financial advisers to organise a complimentary consultation to discuss your wealth accumulation 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