Financial Advice

KNIGHT

With you every step of the way

Building your desired lifestyle doesn't have to be just a dream or a distant reality.

It can be closer than you imagine and more easily attainable than you may realise.

At Knight, our core purpose is to help you meet your financial aspirations and achieve the lifestyle you want.

Whether you're an individual, a couple, a growing family or a business owner – no matter what stage of life you're at – we're here to help you create, grow and protect your wealth. Just like we've helped countless others before you.

A simple approach to a successful outcome

First, we talk to you about your financial situation and identify what you hope to achieve. We look into all financial aspects including your mortgage, investments, superannuation, life insurance, retirement plans and estate plans. Our team of specialists then analyse the information gathered to develop the best strategies for you.

If you have your own professional advisers (e.g. accountants, lawyers, bank managers, etc) we work closely with them to fully understand your situation.

We believe that financially educated, informed decisions create wealth. That's why we readily share our knowledge with you to raise your financial awareness, and help you understand the process without feeling overwhelmed.

Connecting the dots to your desired lifestyle

1

Understanding you

We get to know you, understand your financial situation, and identify your lifestyle goals.

2

Establish your goals

We develop realistic and achievable strategies attuned to your specific goals.

3

Paving the way towards financial freedom

We help you implement your strategies and track your progress towards your ultimate lifestyle goals.

A diverse team with a down-to-earth attitude

Our diverse team of staff include business advisers, accountants, financial advisers, superannuation specialists and asset managers – so you can tap into the expertise you need at any point in time.

Our specialists are focused on supporting you with realistic financial advice through the various stages of your life. With access to our well-connected teams and their full spectrum of skills, our clients are never far away from a clear solution.

"In between goals is a thing called life, that has to be lived and enjoyed."
Sid Caesar

OUR FINANCIAL ADVICE SERVICES

Creating your wealth

This is fundamental to any successful financial plan.

Investment strategies and individually designed portfolios
We design strategies and portfolios, based on your risk profile and your timeframe to meet your goals. If your risk profile is suitable, we can give you the opportunity to invest in corporate actions.

Investment portfolio administration services
We provide managed discretionary account services, i.e. we can act on your behalf when market opportunities arise, reduce your paperwork burden and give you regular informative reporting.

Gearing strategies
We develop gearing strategies, carefully determining if this is a good approach for you. Where it is, we design appropriate structures, ensuring your risks are managed and assets properly protected.

Superannuation planning and advice
We educate you on the importance and potential of superannuation to help you take control of it. We advise you on the approach best suited to meet your long-term needs – which could be a suitable superannuation fund, or a Self-Managed Super Fund which we can help you set up.

Retirement planning
We develop a strategy with appropriate risk protection measures to meet your retirement goals. Our plans help you retire when you want to and, most importantly, enjoy life the way you want to.

Centrelink and aged care advice strategies
We review your potential entitlements, developing strategies to enhance or obtain benefits. We also help you and your family take measures to prepare for potential aged care requirements.

Protecting your wealth

This is important to prepare yourself for unforeseen events.

Life and income protection
Through a detailed analysis of your personal circumstances, we assess your potential risks and insurance requirements. We source the most suitable insurance products and advise you on an appropriate ownership structure to protect you and your family.

Estate planning
We assist you with the process of creating an appropriate Will to ensure the transfer of assets to your intended beneficiaries. With complicated situations or assets that require restructuring, we introduce you to legal specialists or to our in-house business advisers and accountants for advice.

50 YEARS

Celebrating 50 years of helping clients achieve their financial aspirations...

At Knight, our company culture is focused on people and trustworthy relationships – with a strong sense of responsibility for the welfare of our clients.

Take that first step and talk to us.
Let us get to know you and understand your needs. Let us show you how we can work with you during the twists and turns of life to achieve your retirement goals.

Before you know it, you could be just a handshake away from a collaborative journey towards building your dream lifestyle.