These are some of services that I offer:

- Strategic advice that adds value in excess of costs
- Comprehensive & integrated strategies including investments and personal insurances
- Mortgage broking loans (through Australian Loan Company Ltd)
- Rigorous reality check of current financial situation
- Use of sophisticated “Efficient Frontier” investment portfolios
- Tax-efficient strategies - wealth creation & debt minimisation & retirement planning
- Regular ongoing communication with benchmarked performances
- Extensive qualifications and experience; passion for excellence

Characteristics of people suited to my approach:

- are serious about building, or already have, significant wealth
- willing to make some sacrifices today to improve future standard of living (eg retirement)
- want real advice with no bias to any specific products
- want appropriate financial education to facilitate their making informed decisions
- want pros and cons of alternative investment strategies
- want independent research supporting proposals regarding problematical areas
- want a scientific approach to underpin financial modelling and conclusions
- have a primary focus on the benefits and value-add after necessary costs of good advice

Look elsewhere for financial “advice” if you:

- have a primary focus only on costs, instead of the benefits after costs
- are sceptical that a qualified and dedicated professional could improve your wealth
- are unwilling to initially make significant time for input to a fully integrated plan
- are indecisive when presented with pros and cons for a range of choices
- accept non-individualised planning and broad-brush financial modelling
- require wholesale investments and do not wish to use Asgard master trust as the vehicle
- like to be smooth talked, instead of having frank discussions about what is realistic

My Contact Details

Phone: 07 - 3263 3568 or mobile 0409 326 335
Address: 8 Stringybark Drive, Aspley Qld 4034
Email: nmoriart@bigpond.net.au
Internet: www.nmoriarty.com.au

Clients throughout Australia and the world