



The True Value of Financial Advice: More Than Just Numbers

When considering financial advice, it's easy to focus solely on investment returns. However, research from Vanguard reveals that working with a financial adviser delivers value in four distinct and meaningful ways.

Portfolio Value

Financial advisers ensure your investments are well-diversified and properly aligned with your personal goals. This professional oversight helps you manage risk effectively while working to maximise your returns over time.

Financial Value

Whether you're planning for retirement, saving for a home, or funding education for yourself or your children, financial advisers help you develop a clear, actionable plan to reach these important milestones.

Emotional Value

Perhaps most surprisingly, 86% of advised clients report feeling greater peace of mind compared to managing their finances alone. This emotional benefit shouldn't be underestimated—financial confidence affects every aspect of your life.

Time Value

Financial advice also gives you something invaluable: your time back. 76% of clients report saving approximately two hours per week by delegating time-consuming tasks like investment selection, portfolio monitoring, and keeping up with changes to super and tax rules to their adviser. Imagine what you could do with that extra time.

Beyond Budgets and Portfolios

Financial advice is about more than spreadsheets and account balances. It's about giving you confidence in your financial future and freeing you to focus on what truly matters to you.

If you're feeling uncertain about market conditions or wondering whether you're on track to meet your goals, we're here to help. A conversation with your adviser can provide the clarity and confidence you need to move forward with peace of mind.

Ready to discuss your financial future? Get in touch today.