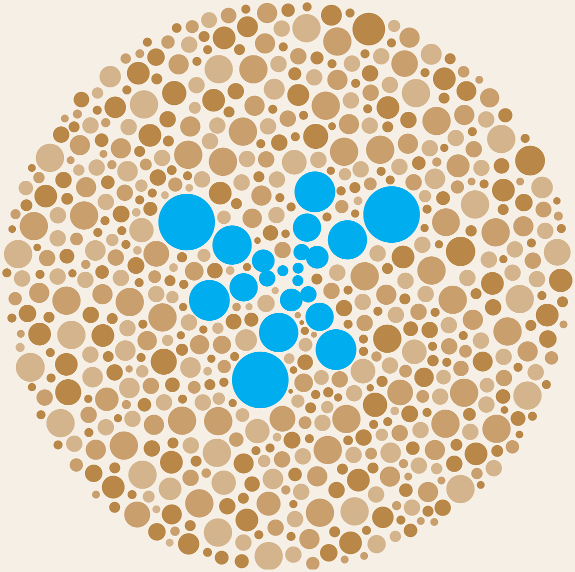
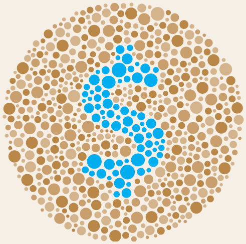


Integrated advice for
complete financial clarity.

mgd wealth

connect the dots

Helping you connect the dots.



About us

MGD Wealth specialises in providing integrated financial advice solutions to business owners, professionals, high income earners and self-funded investors.

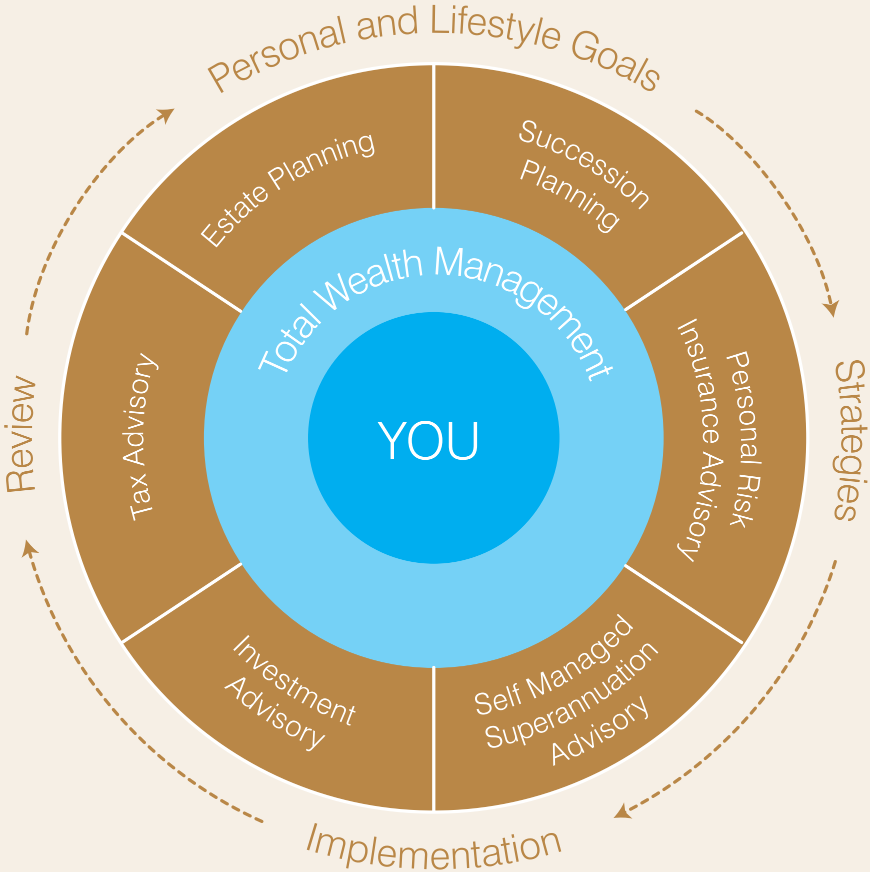
We know that the key to optimal financial advice delivery to our client niche is in integrating the mandated core financial advice disciplines. To that end we built a portfolio of these specialist advice capabilities and developed an advice model that seamlessly integrates them to deliver optimal financial advice – a complete wealth management solution without the traditional gaps in formation and execution.

The MGD Wealth portfolio of specialist advice services includes:

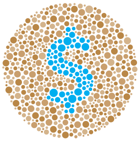
- **Total Wealth Management (TWM)**
- **Investment Advisory**
- **Self Managed Superannuation Advisory**
- **Tax Advisory**
- **Personal Risk Insurance Advisory**

The MGD Wealth difference is not only found in our innovative integrated financial advice model. We are also unique in our ability to deliver on the promise of a complete financial advisory solution. We can do that as your lead adviser or as a member of your financial advisory team.

Welcome to MGD Wealth. To see how we can provide complete financial clarity visit our website **www.mgdwealth.com.au** and complete an enquiry form or call us on 07 3391 5055.


Personal and Lifestyle Goals
Strategies
Implementation
Review
Estate Planning
Succession Planning
Personal Risk Insurance Advisory
Self Managed Superannuation Advisory
Investment Advisory
Tax Advisory
Total Wealth Management
YOU

Have you seen the MGD Wealth Advisory Services Portfolio?

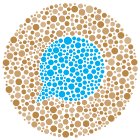


Total Wealth Management (TWM)

Imagine having an adviser who can attend to all your financial advisory needs? At MGD Wealth that was our vision too, so we developed TWM, our comprehensive financial advice methodology designed to provide our clients with an optimal wealth management solution tailored to their unique financial needs and lifestyle goals.

TWM gives our clients a complete financial advice solution that seamlessly integrates the essential advice components from the MGD Wealth Advisory Services Portfolio. The power of TWM is in the application of the core advice disciplines of taxation, superannuation, investment and personal risk insurance interwoven with succession and estate planning considerations. TWM delivers a complete wealth management solution without the traditional gaps in formation and execution.

Through integrated advice TWM gives you complete financial clarity.

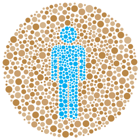


Investment Advisory

Building prudent investment portfolios for our clients is an integral component of our integrated financial advice model. We ensure that your investment strategy is carefully matched to your short, medium and long term personal and financial goals. As a result your investment portfolio is built in contemplation of your investment capacity and your capital needs at all times.

The MGD Wealth Investment Research and Portfolio Construction Model provides the unique framework within which our client investment portfolios are constructed (the specific investment assets chosen) and then maintained on an ongoing basis. This ensures that the underlying investment selection is robust and relevant.

At MGD Wealth see how getting the full investment story gives you financial clarity.



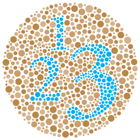
Self Managed Superannuation Advisory

Used effectively, a self managed superannuation fund (SMSF) is the ultimate wealth creation, protection and distribution vehicle.

But setting up and running your own SMSF can be a daunting and frustrating process filled with legal jargon and compliance issues.

So why not use an industry expert. For over thirty years MGD Wealth has been assisting our clients to build and maintain their SMSFs to provide for their enjoyment in retirement and to give them comfort that their assets are protected and will be passed tax-efficiently to their beneficiaries. For those with appropriate levels of income and superannuation assets the advantages of using a SMSF to improve your retirement planning are significant.

At MGD Wealth we have deep specialist knowledge which can dramatically enhance your superannuation outcome. Put yourself in this picture with MGD Wealth.

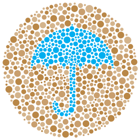


Tax Advisory

Our Tax Advisory services group (MGD Tax) are specialists in identifying opportunities to mitigate the impact of tax on you, your business and your investments, to allow you to build your wealth as tax-effectively as possible.

MGD Tax plays a pivotal part in our integrated financial advice model. We are not driven by compliance and tax lodgement deadlines. To the contrary, our tax team comprises specialist tax, accounting and business advisers who understand the importance of accurate and timely reporting and prudent tax advice, in achieving optimal financial outcomes. For business owners and professionals who are looking for an adviser who can see the outcomes they want more clearly and who has the relationship and technical skills to help deliver those outcomes, look no further.

At MGD Tax we help you see the numbers differently.

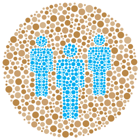


Personal Risk Insurance Advisory

Life, Total & Permanent Disability, Trauma, Income Protection and Business Expenses Insurances protect the most important things in your life: you, your family and your business.

At MGD Wealth we understand that years of hard work and clever investing are the source of your wealth. This is why our aim is to see you retain that wealth through prudent insurance strategies that protect you and your family, your business and your future. MGD Wealth offers you a full suite of insurance strategies tailored to meet your personal needs.

We see the importance of personal risk insurance strategies to your complete financial advice solution.



Working with your Advice Partners

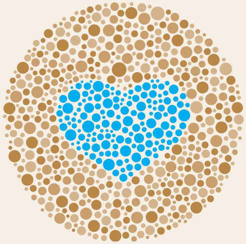
As a provider of specialist financial advisory services we are regularly consulted by other professional advisers, including accountants, financial planners, bankers and lawyers, to enhance their clients' overall financial advice solution.

Our point of difference is not only in the capability of our specialist financial advice offering but also in our expertise in working with your existing advisers as a valued member of your financial advisory team.

MGD Wealth has had a long and successful history of partnering with other professional advisers in delivering a complete client solution.

MGD Wealth: giving you complete financial clarity through integrated advice.

See inside our core.



Our Vision

To be a market leader in the private wealth management industry through our commitment to providing our clients with integrated solutions that deliver complete financial clarity.

A vision, the attainment of which, is highly correlated to achieving the goals and aspirations of our clients, our people and our advice partners.

Our Values

Achieving our vision is underpinned by living our closely aligned values of:

- **Delivery**
- **Innovation**
- **Collaboration**
- **Integrity**
- **Enjoyment**

connect the dots

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