



Wealth Advisory

Plan, Protect,
Build and Enjoy
Your Wealth



Saward Dawson Wealth Advisory

**Purpose-driven expert advice for you,
your children and your grandchildren.**

Our driving purpose is to help our clients fulfill their most important aspirations, achieve financial freedom, enjoy peace of mind in retirement, and create legacies that will positively impact their families, communities and future generations.

Saward Dawson Wealth Advisory provides strategic wealth and investment services for individuals, privately owned businesses, not-for-profit organisations and families.

We bring fresh ideas via a rich network of professionals, blending a unique range of insights drawn from decades of expert advice and strategy development.

For more than 40 years, Saward Dawson has delivered the highest standard of advice and service. We are honoured to now serve as the trusted advisers for many of the adult children of our original clients, and we look forward to having a positive impact on future generations.



What's Your Vision of Success?

Our service starts with a deep understanding of what success means to you.

We help you define a clear vision of “your best life” and advise on a range of integrated strategies to help you achieve your key priorities.

You receive expert insights and practical advice to help protect your wealth, invest wisely, reduce risk, and make better financial decisions.

- o Clarify your priorities
- o 360° strategy brainstorm
- o Optimise structures
- o Invest wisely
- o Proactive advice and support



Lifetime Financial Forecast

Clarity and confidence to make the right financial decisions.

We use visual financial forecasting tools to help you map out and gain critical insights into your financial future. This results in clarity and confidence when planning for future life events, goals and aspirations.

We address key “what-if” questions, explore a range of value-adding wealth and investment strategies, plus forecast

the impact on debt, cashflow, net wealth accumulation and the attainment of important milestones.

The result is a clear ‘map’ demonstrating the value of applying insights and strategy options to achieve the best outcome for you and your family.

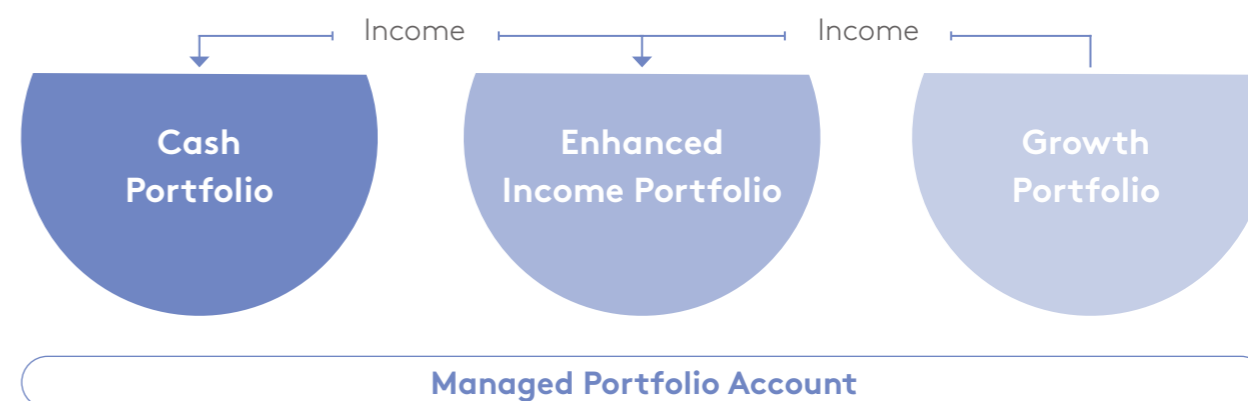


Portfolios Built to Last

Saward Dawson has partnered with the award-winning team at Akambo Investment Management to deliver a boutique managed investment portfolio service, providing our clients with a unique investment edge.

In line with our clients’ investment objectives, our team design tailored portfolio strategies for client investment and superannuation accounts. We proactively manage portfolio risks and opportunities, plus deliver comprehensive portfolio administration, valuation, performance, and tax reporting.

Your Wealth and Investment Strategy



With deep investment expertise and a reliable performance record, our wealth and investments team are trusted to manage portfolios for individuals looking to grow their wealth, high-net-worth families, for-profit and non-for-profit businesses, plus charitable groups both large and small.



Family Legacy Planning

It has been said that building wealth brings financial freedom, protecting wealth brings security, however, sharing wealth brings true satisfaction.

Our family legacy planning service is designed to ensure your hard-earned wealth is directed according to your wishes, protected from undue risk and sheltered from the erosion of taxes and other duties.

We can help you with the prudent stewardship of your legacy, whether directed to family members or important causes and charities.

This includes clarifying your intentions, identifying risks, and briefing your lawyer to provide the peace of mind that your legacy is secure and expressly directed to achieve the positive impact you desire.

Philanthropic Giving

We have a heart for delivering lasting, positive impact; many of our clients do too.

Drawing on decades of experience in the not-for-profit and 'for purpose' sectors, we help you navigate the increasingly complex landscape of charitable trusts, foundations, private ancillary funds, and alternative giving structures.

Our team of experts will help you define a clear investment policy, establish a robust governance structure, and deliver a range of supportive services to facilitate your desire to have a lasting positive impact on the world.

Business Strategy and Succession Planning

Achieving maximum business value with clarity and focus; minus the stress.

Our business strategy and succession planning service will help you grow, protect and unlock the inherent value in your business.

From start-up, to scale-up, to maturity, and your eventual exit, we will support you every step of the way.

Drawing on the multi-faceted expertise of our business advisory team and international consultancy network, we will help you define a clear business strategy, increase employee productivity and engagement, protect your ownership interest, plus maximise long-term business value.



**SAWARD
DAWSON**

Wealth Advisers Pty Ltd

Saward Dawson Wealth Advisers Pty Ltd | ABN 74 620 432 790

Corporate Authorised Representative of Akambo Pty Ltd t/a Accountants Private Advice

20 Albert St, Blackburn VIC 3130 | T +61 3 9894 2500 | F +61 3 9894 1622

E contact@sawarddawson.com.au | W sawarddawson.com.au



**ACCOUNTANTS
PRIVATE ADVICE**
by akambo

Akambo Pty Ltd t/a Accountants Private Advice

ABN 16 123 078 900 | AFSL 322056 | Principal address Level 9, 90 Collins Street Melbourne VIC 3000

All information and advice is for the private use of the person to whom it is provided.

We provide you with services in accordance with our Financial Services Guide.