



finance

our services

- Tax and Accounting
- Insurance
- Financial Planning
- **Finance**
- Portfolio Management
- Estate Planning
- Retirement Planning

reducing the stress of buying property

To help make the process of buying a home or investment property easier, Smith Coffey has a team of specialists who can help you select and set up a loan for your financial benefit.

more than just a broker

All of our financial advisors are tax qualified. This means they can help you with more than just sourcing and arranging your loan. They can help you structure and manage your debt effectively to ensure your options for future investments are always open.

our company

Smith Coffey opened its doors in 1972. Since then, we have proudly helped thousands of individuals and businesses grow, manage and protect their wealth.

Specialising in the needs of medical and dental professionals, we offer a complete suite of services to help you achieve your financial and lifestyle goals.

smithcoffey

make every day a good day



working directly with the bank

Smith Coffey has had a relationship with a major bank since 1972. As a result, our clients enjoy special rates and conditions. For example, medical and dental professionals can borrow 90% of the value of a property (without mortgage insurance) and professionals in general occupations can borrow 85% of the value of a property (without mortgage insurance).

Our clients also have exclusive access to a representative from the bank who works from our offices for your convenience. You can get help with your loan and your everyday banking needs whenever you need it.

unique insight into the market

To help you make the most informed decision, we can provide you with valuable sales and rental data, normally reserved for real estate agents. Using a unique search tool, we call 'Property Outlook', we can find information on the property you are interested in purchasing, as well as comparison information about the surrounding houses in the area. It will save you time and energy when you're property hunting and give you greater peace of mind.

specialist services for doctors and dentists

Smith Coffey has worked with the ATO to help set up and gain approval for various tax structures for the medical profession. This means we are extremely well equipped to handle all types of loans for doctors and dentists.

tailored property loan

A benefit of our relationship with a major bank is that doctors and dentists can borrow up to 90% of the value of a property without having to buy costly mortgage insurance. This additional 10% can mean the difference between getting the house you want and having to save for another year. It can also mean you have the flexibility to diversify your assets because you have more cash available to invest.

setting up your lease

Whether you need a new practice fit out, office equipment or a company car, we can help ensure your lease is structured tax effectively.

making the most of salary packaging

Unlike any other professionals, medical and dental professionals can take advantage of the benefits of Salary Packaging. We can help you set up and structure a package for your financial gain, as well as organise the necessary loans or credit cards.

securing your financial future

We have a client first philosophy that's based around helping you create a secure financial future. This means we take the time to get to know you and your particular needs so that we can make the most appropriate recommendations.

help when you need it

We are here for the long haul. At every stage in your life and career, you can call on us to help. There will always be someone available to answer your questions and guide you through both opportunities and challenges. If for some reason we cannot talk to you at the time of your call, we will get back to you within 24 hours.

to speak with a smith coffey consultant please call 08 9388 2833.

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Financial Planning (Investment and Super) advice is provided by Smith Coffey Securities Pty Ltd AFS Licence No. 237971.

Personal Insurance advice is provided by the Smith Coffey Pty Ltd atf The Bon Unit Trust AFSL/ACL No. 237972.

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