



financial planning

our services

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

achieving your financial goals

Smith Coffey is uniquely positioned as a leader in the financial services industry. Our team's knowledge and experience working with high net worth individuals, particularly medical and dental professionals, is arguably unsurpassed in Australia. We understand the importance of helping you identify your future goals and establishing a clear and realistic path to achieve them.

making the most of your assets

Whether you're entering the workforce as a young graduate, have an established practice, or want to start planning your retirement, we can help you make the most of your assets:

wealth creation planning

We can help you develop strategies to build and preserve your wealth that are tax effective and in line with your particular circumstances.

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



debt management planning

We can help you manage your non-deductible debt efficiently and effectively.

superannuation planning

We can help you manage your superannuation to meet your retirement income goals.

retirement planning

We can help you build a retirement income that's reliable and tax effective.

estate and multi-generational planning

We can arrange your financial affairs to ensure your wishes are implemented through an efficient and tax effective distribution of your estate.

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.**

"We understand the importance of helping you identify your financial goals and establishing a clear and realistic path to achieve them."

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 off The Bon Unit Trust AFSL/ACL No. 237972.

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