



insurance

our services

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

protecting what's important

Most people understand the need to protect their home against theft, their car against damage and their health against the unexpected. But they often fail to protect their income – one of their most important assets.

living without an income

Your income helps build the lifestyle you enjoy and provides security and stability for you and/or your family. But unfortunately, it is not always guaranteed. What if, for some reason, you couldn't work and your ability to earn money ceased? Could you manage without an income? Would you and/or your family survive on what you have saved?

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



finding peace of mind

To safeguard everything you've worked hard for and to ensure you and/or your family are covered against illness, injury or death, risk insurance is crucial. As well as peace of mind, it can provide you with an income stream and/or lump sum when you need it most.

getting the right advice

Leaders in the financial services industry, our financial advisors offer specialist advice in wealth creation, debt management, superannuation and retirement planning. The team's experience working with high net worth individuals, particularly medical and dental professionals, is arguably unsurpassed in Australia.

insurance for every stage in life

Whether you're entering the workforce as a young graduate, have an established practice or want to start planning your retirement, we have access to a range of insurance products to suit your needs.

family protection solutions

We can establish a funding mechanism to provide a lump sum to assist with clearing debt and provide ongoing income for you and/or your family in the event of death, trauma or total and permanent disability, without necessitating sale of the family home.

business protection solutions

We can arrange insurance for key people in your business or as a mechanism to fund your Buy-Sell Agreement.

income protection solutions

We can arrange insurance that protects your ability to earn an income in the event of injury or sickness. We can also arrange for your business expenses to be covered if something unexpected occurs.

claim management solutions

We can liaise with your insurer, your treating doctor and your accountant, whether they are from the Smith Coffey group or another firm.

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.

providing 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.**

"To safeguard everything you've worked hard for and ensure you and your family are covered against illness or injury, risk insurance is crucial."

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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