




THE FINANCIAL PLANNING FIRM FOR BUSY PEOPLE WHO  
WANT TO BUILD MORE WEALTH, GET THEIR FINANCIAL  
HOUSE IN ORDER AND ACHIEVE FINANCIAL PEACE OF MIND.







Assure Wealth offers transparent and easy to understand financial advice that removes the stress from managing your finances and develops a plan to build wealth for the future – without the hidden fees or jargon of traditional Financial Advisers or the big banks.





**PATRICK CASEY**

PAT SPECIALISES IN ASSISTING PEOPLE WHO ARE MOTIVATED TO IMPROVE THEIR FINANCIAL POSITION AND ACHIEVE FINANCIAL PEACE OF MIND.

Patrick Casey is a 13-year senior executive turned Financial Planner, who has held executive management roles within Colonial First State and the Suncorp Group in their wealth management and financial planning divisions.

Pat left the big end of town to pursue a career helping other successful people build more wealth, bring structure to their finances, pay off their mortgage faster and reduce the stress that comes with worrying about money.

Pat's unique level of experience and insight allows his clients to achieve a higher level of financial success, with the peace of mind that they have taken control of their financial future. He does this by taking clients through a 7-step process to identify, plan and implement strategies to build more wealth – 'The Assure Way'.

Pat has a particularly deep knowledge of helping young families in their 30's and 40's, who've built successful careers or businesses, to help strengthen their financial position by protecting the wealth they have built, then removing the stress and complexity from managing their finances, and finally developing a plan to build more wealth for the future.

Pat also works closely with people in their 50's who are approaching retirement and are worried if they've saved enough money to retire, they're not sure at what age they'll be able to afford to retire, and are generally overwhelmed with the complexity that comes with superannuation and planning for retirement.

Finally, Pat has a keen interest in helping couples who have accumulated more than \$200,000 in superannuation between them, are frustrated with their current superannuation funds and are interested in starting their very own self-managed superannuation fund (SMSF).

## QUALIFICATIONS

- Bachelor of Commerce (with Merit) - University of Wollongong
- Graduate Diploma in Financial Planning – Securities Institute of Australia
- Self-Managed Superannuation Funds – Kaplan Australia
- ASX Accredited Listed Product Adviser

## PROFESSIONAL MEMBERSHIPS



# WHO WE ARE

At Assure Wealth, we partner with you to map your own unique path for building wealth, helping you to make smart financial decisions and stay on track to achieve your goals. We'll look out for you, and help you stay in control so that you can focus on more important things – family, friends, career, travel and enjoying life.



YOU

YOUR  
FINANCIAL  
PLANNER



BIG FINANCIAL  
MISTAKES

Your financial planner stands between you and the big financial mistakes.

## WHAT WE DO

We understand that you've already achieved success in your career or business, and now you are looking for someone to help you capitalise financially on all of your hard work. At Assure Wealth, we will do this by getting to know your current financial situation, intimately. From there, we put the best strategies in place to help you move ahead to the next level.

We will gain a deep understanding of your current situation in order to answer the following questions:

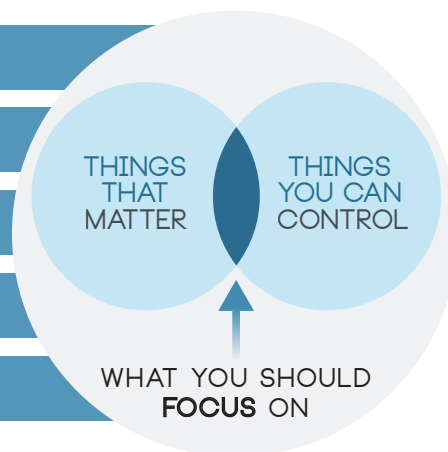
Do you have a strategy in place to build wealth?

Could you potentially pay less tax?

Are you paying off your mortgage as quickly as you can?

Do you and your family have adequate protection in place?

Should you start a self-managed superannuation fund?



FINANCIAL  
PEACE OF  
MIND

ENGAGEMENT  
WITH A FINANCIAL  
PLANNER

WE HELP YOU GET ON THE FRONT FOOT TO NAVIGATE THE COMPLEX AND EVER-CHANGING FINANCIAL WORLD TO PROVIDE YOU WITH FINANCIAL PEACE OF MIND.

# HOW WE CAN HELP YOU



## I NEED HELP MANAGING MY MONEY

We can help you get an understanding of your finances and show you how to use your surplus money to improve your future lifestyle.



## I WANT TO PAY OFF MY MORTGAGE FASTER

Paying off your debt as quickly as possible is integral for the success of your wealth creation strategy. We can coach you on some simple and effective strategies to pay off your mortgage faster.



## I WANT A FINANCIAL PLAN TO BUILD WEALTH

We offer a variety of financial planning services, including wealth creation, setting up investment portfolios plus making sure you and your assets are well protected.



## I NEED HELP WITH MY SUPERANNUATION

Superannuation is the cornerstone of retirement planning. Even though retirement may not be at the top of your mind, it's important to get your strategy right now so you can see the benefits in future years.



## I NEED A FINANCIAL PROTECTION PLAN FOR ME AND MY FAMILY

Everyone should have a backup plan as illness or injury can derail even the best laid plans. Personal insurance can provide this backup plan for you and your family.



## I WANT TO START A SELF-MANAGED SUPERANNUATION FUND BUT DON'T KNOW WHERE TO START

Self-Managed Super Funds (SMSF) are becoming increasingly popular. You can even borrow money to purchase an investment property within a SMSF.



# WHO WE WORK WITH

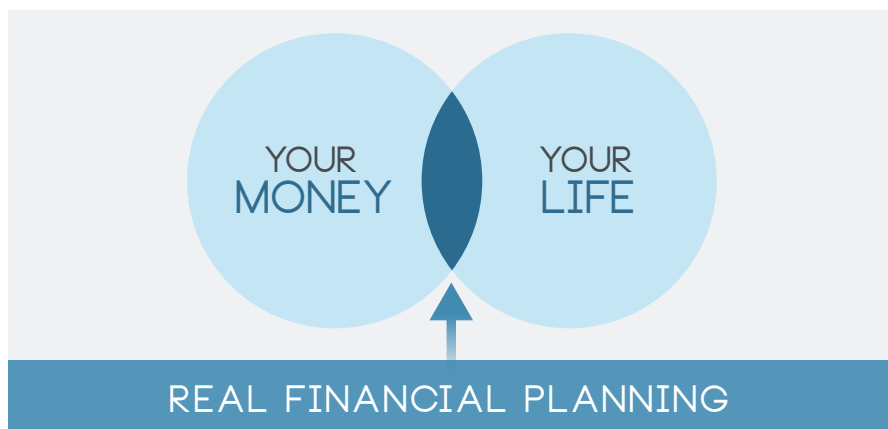
Our clients are busy people who don't have the time or energy to worry about managing their finances. They work hard and want to spend more time with their family, friends, and winding down from their busy schedules. They want to succeed in their career, pay their mortgage off faster, give their children a great education, travel and build wealth for the future.

We do our best work for clients who demonstrate the following characteristics:

1. They are motivated to improve their financial position and achieve financial peace of mind.
2. There is a level of financial complexity in their lives that requires the assistance of a specialist.
3. They want to outsource areas of their financial management due to a lack of time, expertise or desire to do it themselves.

## WHAT SETS US APART?

At Assure Wealth, we understand the challenges that young, financially successful people face with trying to manage a career, a mortgage and a family. Our difference is that we will always strive for solutions that help you achieve your specific goals, remove complexity and stress and implement simple, easy to understand strategies to help you get ahead financially.



EFFECTIVENESS  
OF THE ADVICE

SIMPLICITY OF  
THE ADVICE



WE HELP YOU REMOVE THE  
COMPLEXITY AND ANXIETY  
FROM LOOKING AFTER  
YOUR FINANCES.

## SEVEN ESSENTIAL STEPS TO YOUR FINANCIAL SUCCESS THE ASSURE WAY

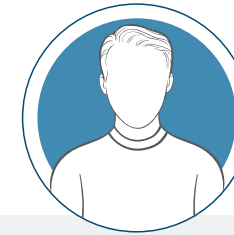


# COMPLETE FEE TRANSPARENCY

FEE CERTAINTY AND TRANSPARENCY MEANS THAT OUR CLIENTS DON'T EXPERIENCE ANY NASTY SURPRISES OR HIDDEN COSTS.

At Assure Wealth, we want our clients to have a great experience when they engage us, so they keep coming back to build a long term partnership. We also want each of our clients to know exactly what fees they are paying, and what they are receiving for that fee. We want engaged and highly satisfied clients who are so happy they tell their friends and family about us.

We know that our firm cannot cater for every person's situation. If we think you could benefit from working with another professional, we'll advise you to do so.



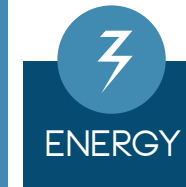
THINGS YOU HAVE TO  
**INVEST**



MONEY



TIME



ENERGY



SKILL

IT'S NOT JUST ABOUT THE MONEY

"AT ASSURE WEALTH, WE HELP CLIENTS ACHIEVE THEIR FINANCIAL GOALS FASTER, EASIER AND WITH MORE CERTAINTY THAN THEY COULD ACHIEVE THEMSELVES."

PATRICK CASEY  
MANAGING DIRECTOR





# FINANCIAL KNOWLEDGE CENTRE

As part of our commitment to provide a leading level of service, we are pleased to offer our clients exclusive access to our online Financial Knowledge Centre. The Financial Knowledge Centre provides our clients with an online library of financial resources, educational information, videos and calculators to help build their financial knowledge.

The screenshot displays the Assure Wealth Knowledge Centre website. At the top, there is a search bar and a 'Login' link. The main header features the Assure Wealth logo and the text 'KNOWLEDGE CENTRE'. Below the header is a navigation menu with icons and labels for Home, Modules, Articles, Videos, Life Events, Calculators, Quiz, Competition, and Extras. The main content area is divided into two sections. The left section shows a large, faded Assure Wealth logo. The right section contains a 'Login' form with fields for 'Username:' and 'Password:', a 'GO' button, and a link for 'Forgotten your password?'. Below the login form, there is a message: 'Use the menu bar above to view publicly available content.' and a section for 'Not a member?' with a link 'Click Here to become a member'. At the bottom of the page, there is a disclaimer: 'This Knowledge Centre provides general educational information only. The content does not take into account your personal objectives, financial situation or needs. You should consider taking financial advice tailored to your personal circumstances. < Assure Wealth Pty Ltd ATF Assure Wealth Trust () has representatives that are authorised to provide personal financial advice. Please see our website www.assurewealth.com.au or call 1300798038 for more information on our available services.' and a link 'View Terms and conditions'.

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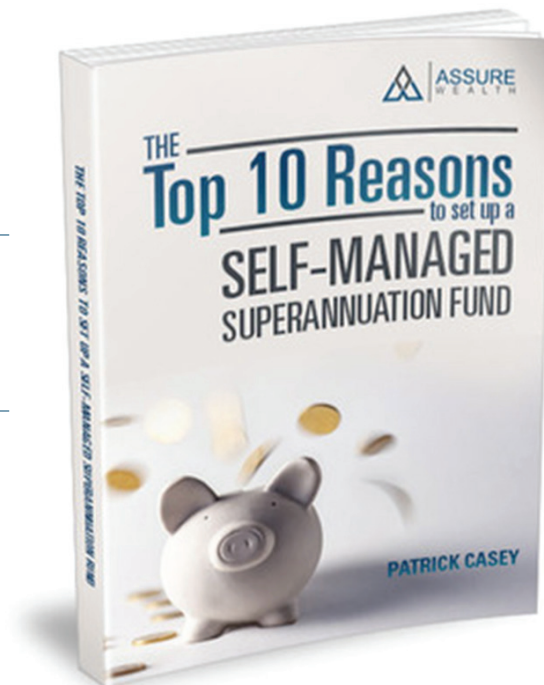
# ASSURE WEALTH CLIENT RESOURCES

## EDUCATIONAL VIDEOS



## EBOOK

The Top 10 Reasons To Set Up A Self-Managed Superannuation Fund



Pat is someone who gets the job done, whilst having a well calibrated moral compass. I always found Pat to be a business savvy, commercially minded individual with a strong focus on the clients. He talks straight and will always have your back."

- Mark, Sydney  
FINANCIAL SERVICES MANAGER



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- SOUTHERN SYDNEY OFFICE

Suite 103/ 304 - 318 Kingsway, Caringbah NSW 2229

*Phone:* 1300 79 80 38

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Assure Wealth Pty Ltd Corporate Authorised Representative no. 1244817, Patrick Casey Sub Authorised Representative no. 1244748 of Walker Lane Pty Ltd ABN 70 626 199 826, an AFSL holder No 509305.

[www.assurewealth.com.au](http://www.assurewealth.com.au)