

Aon Private Clients Wealth Services

A dedicated investment and risk protection service

Aon – working with you, for you

Aon Wealth Management has a team of experienced risk management and investment specialists to help you grow and protect your wealth. Our advice will only include recommendations, products and services that are relevant to you. We are not owned or influenced by a bank, insurance manufacturer or financial institution, so you can be confident that our advice and recommendations are based purely on your needs, without any parent company product influence.

As a valued Aon client, you can expect personalised service. We take a long-term view to develop financial strategies that cover your whole working life, retirement years, and even your next generation.

Aon's financial planning process



For more information on how the Aon Private Clients team can assist you please contact:

Sharyn Rouse

Divisional Manager
Private Clients

t: 03 9211 3321

m: 0422 004 252

e: sharyn.rouse@aon.com

Our specialist services

For you

- Investment strategies that make a difference, including gearing
- Preparing for life's unfortunate circumstances
- Protecting your greatest asset, your income earning capacity
- Retirement planning and self managed superannuation support
- Active portfolio management – taking advantage of opportunities
- Ongoing review service to keep on track

For your family

- Estate planning – fulfilling your final wishes
- Inter-generational asset transfers
- The right trust structures to manage complex objectives
- Helping your family with their own financial strategies

For your business

- Business succession planning including buy/sell agreements
- Superannuation plans with staff benefits
- Strategies to minimise business risk including business expenses insurance and key person risk protection

The information in this document is general in nature. Your personal objectives, needs or general situations were not taken into account when preparing this information. Financial planning services are provided by: Aon Hewitt Financial Advice Limited (AFSL No. 239183, ABN 13 091 225 642). Registered office: Level 33, Aon Tower, 210 Kent Street, Sydney NSW 2000.

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