CBC Financial Advisers

Looking at the big picture

Everyday life can be so busy. Between work, family and social commitments it can be hard to sometimes see things from a wider perspective. Like planning for your long-term future, and supporting your loved ones. What will happen if you can't work due to illness or injury? How will you fund your retirement? What will happen to your estate?

When it comes to something as important as securing your financial future, working with a professional adviser is the best decision you can make. We'll help you pinpoint your specific goals and objectively review your finances – providing you with a clear and realistic plan to help achieve those goals.

Don’t just let things happen, embrace the next chapter with confidence and clarity.

Take advantage of our expertise.

We can help you:

- get a clear understanding of your finances and goals to work out how much you need
- understand the choices available to you and set up appropriate strategies to suit your individual circumstances
- create a personalised plan to help you achieve your goals.

We can guide you through the process each step of the way.

1. Meet & Greet

We, as Count Financial advisers, will spend time with you to review your current situation, understand your goals and attitudes to investing, and outline how you can make the most of your financial future. You can then decide if you want to proceed with more help.

2. Recommendation

We’ll research your options and prepare a personal financial plan tailored to your specific needs, outlining clear strategies that aim to help you reach your goals. We’ll answer any questions you have and explain the plan in detail.

3. Implementation

Once you are completely comfortable and if you agree, we’ll implement the best options on your behalf so you can be on the right track to financial security with peace of mind. It’s that straight forward.

4. Review

We’ll keep in touch with you and arrange an annual catch up, so we can review your plan and make any adjustments to help keep you on the best path to achieving your goals.

A long-term partnership bringing more than just financial benefits

Achieve your goals

Design a plan that saves and helps your money grow, so you can reach your goals.

Become debt free

Pay off your home loan and other borrowings faster — make debt work for you, not the other way around.

Invest for your children’s future

Make sure you can give your children the best possible start in life.

Become financially secure

Grow and protect your wealth and look forward to the future with confidence.

Get a better work-life balance

Achieve the freedom to work because you want to, not because you have to.

Retire in comfort

Retire when you’re ready and enjoy a retirement lifestyle that’s worth looking forward to.

Our business

CBC Financial Advisers has provided financial planning services to clients across Sydney, and Australia, since 1994.

We're committed to giving our clients quality financial advice that is tailored to their individual needs and circumstances. From superannuation to retirement planning, and almost everything in between, our goal is to help our clients achieve their financial goals.

Our commitment to quality advice and service is demonstrated through our adherence to the FPA Code of Professional Practice, which fosters the highest standards of professional practice and consumer protections.

Our hard work is also recognised by our peers. In 2017, we were awarded the "Outstanding Quality Advice Award" by our licensee, Count Financial, from a peer group of over 200 Member firms.

Our financial advisers, Dimos Fessopoulos AFP® and John Mihail CFP®, have the technical expertise and real-life experience to provide advice over a wide range of areas.

With our expertise, we can help you:
• get on the road to becoming debt-free
• invest to give your children a brighter future
• protect what's most important to you
• achieve the level of financial security you're looking for
• reach and maintain your ideal work-life balance
• retire in comfort with peace of mind

Our advice and service

At CBC Financial Advisers, we take great pride in helping clients with their financial future.

When you meet with us, we'll discuss your objectives, your current situation and answer all of your questions. The financial advice process is all about helping you achieve your goals and feeling comfortable with the strategy and execution, so we make sure the advice we provide is always in your best interests.

Our services include:
• Financial planning
• Wealth creation
• Wealth protection (insurance)
• Superannuation
• Gearing
• Transition to retirement
• SMSF investment strategy

For clients who require a wider range of services, through our reliable service partners we can assist you with:
• SMSF establishment or wind-up
• SMSF maintenance
• Home and investment loans
• Business loans and asset finance

Want to know more?

We look forward to working together with you, and helping you to start living a better financial life. Please contact us to set up your appointment.

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Our chosen partner

Count Financial Limited

Our financial advisers are authorised to provide financial advice under the Australian Financial Services Licence (AFSL) of Count Financial Limited, Australia's largest network of accountant-based financial advisers.

We chose to partner with Count because of their long standing history of empowering accounting firms to secure their clients' financial future.

Count has been in operation since 1980 and is now owned by the Commonwealth Bank Group of Companies. Count's position is unique as it provides the benefit of being part of a large and trusted financial institution yet still operating as a standalone business.

For more information on Count visit **www.count.com.au**

Or visit our website at www.cbc.com.au

Member of Count

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