



Welcome Guide

Secure your future

Personalised financial advice and wealth management

What's your vision of financial freedom?
Together, we can create a sustainable path to financial success designed to protect you, your family and the planet.

Let us take care of your finances, so you can focus on what's important.

Where are you on your financial journey

Let's plan a path based around your unique circumstances.

Our group is led by vigorous moral principles, understanding that it is our responsibility to manage clients' wealth carefully and consciously.

We prioritise the interests of our clients, delivering financial advice in a straightforward way, helping them to make confident and enlightened decisions about their futures.

Peace of mind for your personal journey

- Tax-effective, long-term investment and income strategies
- Insurance to protect the things that matter most
- Finance to fund opportunities as they arise
- Superannuation and retirement planning

Security for your family journey

- Tax-effective income strategies
- Planning ahead for school fees
- Income protection and estate planning
- Owning your own home sooner

Protection for your business journey

- Securing your revenue and assets from unexpected events
- Working out your business and income generation structures
- Managing risks associated with employee turnover
- Protecting your interests as an owner
- Ensuring buy-sell agreements are in place

Services

Our goal is to protect your family's future through comprehensive financial advice and sustainable investments which will help to protect the world they'll inherit.

We are committed to ethical business practices that drive long-term value, and result in a brighter future for all of us.



Planning

Once we understand your goals, we'll develop a simple pathway to help you realise them. Because everyone's journey is unique, and it is never too late to get started.

Tell us what you'd like your life to be – now, in five years time, and in the longer term. We'll be with you every step of the way.

- Superannuation and retirement planning
- Tax-effective debt, cash flow and savings advice
- Wealth protection and estate planning
- Investing



Investment

Via cut through all the complexity, implementing and managing a straightforward plan focused on sustainable investments that help to protect the planet.

We'll keep costs low, and ensure it's diversified for long-term wealth creation.

- Risk assessment
- Long-term investment and income strategies
- Sustainable and tax-effective investing

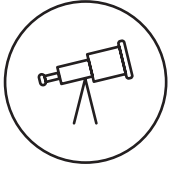


Finance

Via provides a considered perspective that puts your interests first.

We will take the time to understand your needs and wants, so we can tailor a financial solution to fit your unique circumstances.

- Second opinion on your loans
- Refinancing
- Releasing equity for investment
- Restructuring loans to minimise tax



Your dedicated, expert team

Our team of specialists collaborate seamlessly, utilising each other's skill sets, with the shared goal of growing wealth in the right way.

We're passionate about what we do and understand that by working together, we can deliver time and time again for our clients.

Who are Via ?

Via are a modern financial group, specialising in financial advice, wealth management, and personal and business insurance.

Based in Sydney, the Northern Rivers region of New South Wales and the Gold Coast, our accredited and highly experienced advisors can help you achieve your goals in an ethical and sustainable way.

What we do

Our purpose is to help more people secure their financial future. We do this with personalised financial advice, insurances, superannuation, investments and more.

So, wherever you are on life's journey, we'll create a roadmap that's designed around you and your family.

How we got here

Via was formed when Life Risk Management and Monet Financial Solutions came together. Derived from the Latin word for 'by way of', Via will guide you when you reach life's crossroads, and help you overcome any obstacles along the way.

From day one we've delivered financial advice and wealth management in unison, working together to help people achieve financial freedom. Via is built on trust and personal relationships.

Our experts are always available, so you can make informed financial decisions or discuss new opportunities.

Client Testimonials

We understand our clients' needs intimately, aligning progressive financial strategy with values that work in harmony with our world. Our workforce is emotionally invested in the success of the communities that we serve, and we ensure every detail is taken care of.

Don't just take our word for it, take a peek at what our clients just like have to say about us.

Client Testimonials

"The scope and depth of service provided by Via exceeded our expectations. Our individual circumstances and needs were tailored to, and the insurance and investment options were suitably matched.

The process undertaken to achieve this included personalised and thoughtful client consultation, and thorough research by the team. Via have boosted the confidence we have in our future and we appreciate their ongoing support – especially when they see opportunities for us."

Brianna and Greg Lofhjelm

"Via provided a strategic finance solution that challenged the traditional lending process. By maximising the borrowing capacity against our home we could invest in our business and other assets.

With Via's continued guidance we have a monitored mortgage solution focused on repaying non-deductible debt first, minimising tax, maximising cash flow and accelerating the growth of our family's long term wealth."

Matthew and Sharmayne Frost

"During the years we have been associated with Via, the team has exercised a realistic and compassionate approach to our affairs - especially when my husband passed away. We were not wealthy, so we needed to make sure our finances were used to the best advantage.

Over this time the team have put strategies in place to reduce taxes and maximise entitlements, always making themselves available when needed. Via has made my life far easier in troubled times and I am sincerely thankful."

Valda Jenner

Client Testimonials

"The service provided by the whole team at Via Financial Group has always been friendly and efficient. We have no hesitation in recommending Peter and his team to anyone who would like to discuss options for their financial future."

Clare & Colin

"We would like to thank the wonderful team at Via as they have had a significant and positive impact on our lives over the past 5 years, navigating us through some very complex financial and investment matters and setting us up with a comprehensive and comfortable financial strategy that meets our current and future expectations.

We meet regularly and they provide us with detailed advice and guidance on all the financial matters we need to be across including superannuation, life insurance, tax implications, retirement and estate planning."

Jill & Wayne

"We have been a client of Via's for the past 5 years. Over this time Via's team have continued to question our family's financial goals and implement accordingly, a concise and easy to understand financial plan.

This was then backed by a robust life insurance program, giving us peace of mind, which in turn allowed our family to get on with enjoying life, knowing that our financial future is secured. We would highly recommend Via without hesitation, to anyone thinking of having their financial affairs reviewed. "

Trent & Jessica

Client Testimonials

"We first sought out Via Financial Group's help with our finances to help smooth Stephen's path to retirement. They impressed us with their willingness to visit us in our home for appointments, the clear and concise suggestions for our future investments and also that no matter how small the problem may be, they are always there to help.

We have no problem in giving Life Risk Management the highest recommendation for future clients. "

Stephen & Gai

"My wife and I have been with Via Financial Group since 2006 and highly recommend their services. They have assisted us with complex financial structures and we have been more than happy with the results.

We are very impressed with the personalized professional service, and how Via have tailored this specifically to suit our situation and future needs. In particular, their finance division which has access to lenders not easily accessible to the general public.

Ben & Ashleigh

Start your journey.

Your journey doesn't fit in a box or conform to a checklist. So we'll take the time to get to know you and your family, your hopes and dreams. And then we'll make it simpler for you to have the life you want, now and in the future.



Questionnaire before your first appointment



Discovery meeting



Plan presentation



Mutual commitment



45 day follow-up



Progress meetings

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