



DEBT &
LENDING
PHILOSOPHY

with

WEALTHPARTNERS



Our Beliefs

Our Approach

'Debt & Lending'

Debt & Lending is more than just about borrowing money. When structured correctly and in accordance with your needs and circumstances, it can be a powerful tool in building wealth, minimising tax and achieving your financial goals.

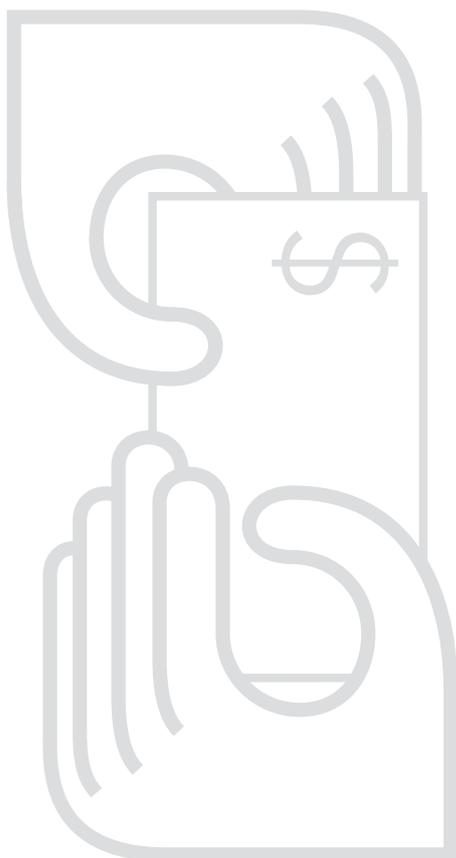
We

At WealthPartners we provide more than just traditional mortgage broking.

We make no assumptions and know that your individual requirements and objectives will differ from other clients. This means that any plans and strategies we create with you are crafted specifically with your situation at the core.

Correctly structuring your 'Debt & Lending' is a balancing act that requires following a process and careful considerations along the way. One such consideration is understanding you and your family's detailed cash flow.

We are passionate about your desired outcomes and therefore understand the importance of being well informed. We commit to providing ongoing education about the industry, what to consider and what to expect. Together we will decide on a tailored approach and solution.



Our Solutions

Why borrow?

- 1 For family/Personal security i.e. buying a home
- 2 For investment purposes
– Property/Inv portfolio
- 3 To start or grow a business
- 4 To get back on track
– using debt consolidation
- 5 Other (renovations, medical expenses, travel, education etc.)

We

We work with most Lenders in the market from the major Banks to the small niche lenders. We believe that each has a particular role to play and every client has varying needs.

As a WealthPartners' client you can benefit from our experience and knowledge of the market, the lenders, the products offered and their respective features, the expected time frames for completion and, the interest rates on offer. You can be certain that our team will perform continual due diligence to ensure your ongoing peace of mind.



Our Service

Manage the process

'Debt & Lending' is so much more than just getting a loan and paying it back. It is a process to ensure the best outcome requires a number of parties are involved. We personally manage this process from beginning to end.

Trusted Specialists

WealthPartners have over time built a network of trusted specialists and would be happy to introduce them to you during the process. Our trusted specialists include:

- > Accountants
- > Financial Adviser
- > Conveyancers/Property Lawyer
- > Quantity Surveyor
- > Buyers Agent/Property Strategist

The Power of a Team

With an experienced team of professionals all the research, administration and execution is managed on your behalf, whilst keeping you in the loop throughout the entire process.

No Assumptions

We immerse ourselves to ensure we understand your complete financial picture, your preferences and most importantly the desired outcomes. We then provide you with the recommended options and strategies working with you to find the optimal solution. You will be informed and empowered to make decisions.

A Partner for the Life of your Debt

We understand that your personal 'Debt & Lending' is constantly evolving based on changes in your needs, your family, your job or other changing circumstances. This is why we regularly meet to review your situation to determine whether any changes in structure are required.

Costs and how we are paid

Our advice costs are typically covered through payments by the respective lender. Any additional costs would be discussed and agreed with you prior to commencing any work.