

A man with a beard, wearing a black wetsuit, stands on a sandy beach with his back to the camera. He is holding a light-colored surfboard above his head with both hands. The ocean is in the background under a cloudy sky. The image is framed by large teal geometric shapes on the left and right sides.

*Focused on you*



**DIAMOND BLUE**  
FINANCIAL SERVICES



# Why work with Diamond Blue?



At Diamond Blue Financial Services we are 100% focused on you. We take the time to understand and chart your financial direction, keep you on track and have your financial and personal interests at heart. We have offices located in the Sydney CBD and on Sydney's Northern Beaches and have over 25 years experience working with individuals, business owners and family groups – investing across a diverse range of financial services.

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### **Make the most of opportunity**

For the majority of executives, professionals and retirees, paying the right amount of attention to your financial affairs is difficult, and opportunities to enhance and protect your wealth too often get missed.

As a Diamond Blue client, we're constantly monitoring and managing your financial affairs leaving you more time to focus on what's important to you and your family.

Our services will ensure that we are on top of all your finances while you are able to attend to your own personal commitments.

### **We save you time.**

Time is your most precious asset. We save you time by acting as your financial gatekeeper. By intercepting all investment requests and providing advice and direction, we ensure *you* can continue to focus on what is most important or pressing, such as that family event, progressing your career or focusing on growing a successful business.

### **We have your best interests at heart**

We are 100% focused on you, your wealth creation and wealth protection.

Our rigorous investment protocol aims to provide the most favourable outcomes for you financially and personally.

### **Have Control**

Stay in control of your financial future. You will always be informed and have full transparency across your portfolio and financial affairs.

### **Consistency and Experience**

Our dedicated and loyal staff have extensive proven expertise providing you with that all-important peace of mind and consistent experience.

*We have a formidable record of delivering personalised and intelligent strategies to help clients build, manage and maintain their wealth.*

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# Services



Diamond Blue offers a complete financial planning, wealth management and protection service. We can assist you with all of the following:

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## Financial and Retirement Planning

What is most important to you? We focus on your personal circumstances, risk tolerance and financial needs. We give advice and direction on:

- ▼ Structural Advice e.g. Trusts, SMSF or individual
- ▼ Asset Protection and Trusts
- ▼ Philanthropic Strategy
- ▼ Redundancy Advice
- ▼ Executive Advisory
- ▼ Expatriate Services
- ▼ Planning for Retirement
- ▼ Transitioning into Retirement
- ▼ SMSF
- ▼ Aged Care
- ▼ Multi Family Office Services
- ▼ Portfolio Management
- ▼ Investment Opportunities and Funds
- ▼ Cash Flow and Tax Planning

## Superannuation and Self-Managed Superannuation

We can help you design your own Self-Managed Super Fund (SMSF) or assist in administration of your super across other funds. Our services include:

- ▼ Self-Managed Super Funds
- ▼ Roll-overs
- ▼ Investment Strategy
- ▼ Company Super Funds
- ▼ Employee Benefits

## Portfolio and Financial Administration Management – Family Office Services

We offer a unique service offering total administration of all your financial affairs. We are a central contact point for you and we have the ability to orchestrate all meetings with other required specialists.



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### **Life and Disability Insurances**

We have experienced, specialist insurance advisers that can provide advice to ensure you have the most appropriate protection for your family and business. We can assist you with:

- ▼ Life Insurance
- ▼ Total and Permanent Disability Insurance
- ▼ Trauma Insurance
- ▼ Group Insurance
- ▼ Income Protection Insurance
- ▼ Business Insurance:
  - Protect your key people
  - Protect your business expenses
  - Financial protection for your equity partners

### **Estate Planning and Generational Change**

Working with our trusted legal partners we provide you with peace of mind when it comes to your estate including:

- ▼ Structuring of assets and trusts
- ▼ Wills
- ▼ Maximising the value of your estate
- ▼ Minimising taxes and expenses

### **Lending Solutions**

We can assist you with finding the ideal finance for your home, business, investment or other personal needs.



*Time is your most precious asset. We save you time by acting as your financial gatekeeper.*

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- ▼ Financial and Retirement Planning
- ▼ Superannuation and Self-Managed Superannuation Funds
- ▼ Portfolio and Financial Administration Management – Family Office Services
- ▼ Life and Disability Insurances
- ▼ Estate Planning and Generational Change
- ▼ Mortgages / Lending Solutions

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