

Our Privacy Policy contains further information on how we collect, hold, use and disclose your personal information. It also sets out how you can access the information we hold about you, how to have it corrected and how to complain where you are not satisfied with how we have handled your personal information. Our full Privacy Policy is available on our website.

FREQUENTLY ASKED QUESTIONS

Does a large financial institution or bank own Forrest Private Wealth?

Forrest Private Wealth is a Director owned financial planning practice. We have our own AFSL which means we can look at all asset classes and investment vehicles because unlike many financial planning firms, we are not owned by or operate under a major bank, financial institution or large dealer group.

Being Director owned means we have no restrictions on which strategies, products and investments we can recommend to clients.

We can recommend virtually any investment option available to Australian investors. Decisions are made on an objective basis determined by product quality alone and whether it will help meet client objectives.

What does a Financial Planner do?

A Financial Planner helps you to define and understand your goals and is focused on helping you maximise the probability of achieving these goals and assisting you in making smart financial decisions.

A Financial Planner will assist in developing a path to follow whether your goals are short, medium or long term.

A Financial Planner can help educate you about financial matters such as insurance, superannuation, interest rates, stock markets etc.

When should I see a Financial Planner?

Usually people seek advice from us when there is a specific need like planning to retire, buying a first home or protecting assets.

Seeking a Financial Planner is valuable at any time in your life. We can help you set and achieve your financial goals no matter what your life circumstances are.

Is it expensive to see a Financial Planner?

It depends on what your needs are. At Forrest Private Wealth, we clearly define the cost to clients before agreeing and accepting any work. You essentially determine the cost (based upon our fee), as you decide what level of service or advice you require.

Is Financial Planning only for those who have a lot of money?

This is a common misconception that Financial Planning is only worthwhile if you have significant wealth. Forrest Private Wealth helps a diverse set of clients from all sorts of backgrounds and financial needs.

You don't need to be well off to start a financial plan; the plan to create wealth for you.

What outcomes can I expect from using a Financial Planner?

Depending on how engaged you are with your Financial Planner, we can assist you with:

- Developing a customised financial plan to help you achieve financial success with little impact on your after tax cash flow.
- Providing clarity about your investments and risk insurance.
- Peace of mind knowing a qualified, professional is reviewing and monitoring your portfolio and keeping you on track towards your financial goals and objectives.
- Certainty, knowing that if something happens to you, your family and children are looked after and that their assets pass to the ones you love per your instructions.

Will you give me advice that is suitable for my investment needs and financial circumstances?

Yes. To do so we need to find out your investment objectives, financial situation and needs before we recommend any investment to you.

You have the right not to divulge this information to us if you do not wish to do so. In that case, we are required to warn you about the possible consequences of us not having your full personal information.

What should I know about any risks of the investments or investment strategies recommended to me?

We will explain to you any significant risks of investments and strategies that we recommend to you.