



Hywood Partners

*Straight talking financial advice.*



Work hard. Play hard.  
Plan hard.

## Our Story

The story of Hywood is about a commitment to the client.

At Hywood, we recognise the need to adapt to changes in the world today and to meet the needs of the modern day client. We believe in financial advice that is more client-centric and built on a strategic approach instead of a product approach.

Named after a grandfather who taught us there's nothing more valuable than education, Hywood is a brand committed to going beyond advice and educating the people most important to us (that's you), with transparency and honesty. It's all about straight talking financial advice. We won't confuse you or over-complicate things, because the truth is, you've got enough complexity already in your life.

*We're changing, and that's a good thing, so welcome to the new Hywood Partners.*

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Same book. New chapter.  
Same office. Same service.  
New letterheads. New strategies.

Finding *clarity*  
from complexity.

1

## Our values

We think it's important that you get to know us. Here are the values that drive us:

### Straight talkers

What you need is a trusted adviser who'll give it to you straight. You'll get our honest opinion without the frills. This is your financial world and you deserve to know what's going on.

2

### Committed to education

Education is a value close to our hearts and we believe that a big part of our role as principal advisers is to help you understand what you don't know in order to be in control of your own finances.

3

### Adaptive to change

The industry is changing, and so are we. We will be a company proactive in nature and adaptive to the changes taking place in the world, for our clients.

4

### Relationship first, advice second

At the heart of our business, we have a genuine desire to get to know you and everything we do is centred on building stronger relationships so that we can help you more.

5

### Clarity in complexity

Your financial world isn't simple. We get that, and it can be hard to keep track of. We aim to demystify the jargon and terminology and find clarity in your complexity.

We work with people at all stages of life including:



### Business owners

You are building your business and don't have time to ensure your financial planning is in order. We help business owners tackle the complexity of creating a personal wealth plan in the context of their businesses. We create the appropriate structure and strategy for success.



### Professionals

As a busy professional, you lead a busy life. At Hywood Partners, we understand the need for your financial world to be set up appropriately and structures to provide a strong future as reward for your hard work. We work with you to get the plan in place to achieve that, around your schedule and capacity.



### Family businesses

Family businesses undergo unique seasons of growth and succession. We work directly with families to navigate the complexity that exists in these situations and find a clear strategic direction forward for everyone.



### Transitioners

You've spent a lifetime building your wealth and as you enter a new era of your life, it's time to strategically plan how best to enjoy it. At Hywood Partners, we walk with you every step of the way to set up a strategy to allow you to maximise your retirement lifestyle.

## Our approach

We believe in walking through a process that demystifies the complexity of your financial world and educates you on the things that matter. We call it the Hywood way and it's all part of our commitment to straight talking financial advice.

### ① Demystify the complexity in your financial world

No matter how complex your financial world may be, we help you by demystifying the terminology and helping you make sense of your current position.

### ② Provide clarity and education in everyday language

We help you find clarity and understanding in your current situation and communicate it to you in every day language.

### ③ Make decisions and set objectives together

Once we're all on the same page, we're empowered with the information we need to make the appropriate decisions moving forward, together.



## The foundation of relationship

We get to know our clients; really know them.

We understand your needs, dreams, values and what's most important in your world. We believe this to be the most powerful foundation for any engagement.



*Straight talking  
financial advice.*

## How we help

We help our clients get a clear picture of their existing financial world and make a plan for the future to build on their wealth and access it at the right time.

Our engagement pathway is strategic and intentional, and designed to help you plan your future:

- 1 Initial discovery meeting**  
Developing a deep understanding of your plans and dreams.
- 2 Advice map**  
A one-pager to summarise your financial world and objectives.
- 3 Engagement projects for the next 12 months**  
A plan for the coming year and how we can help.
- 4 Annual Refresh meeting**  
Discuss the 12 months past and rediscover the next 12 months.

## We provide services across:

### Personal financial planning

Creating a plan for your personal financial world.

### Business succession planning

Planning the future of your business and your eventual exit.

### Family wealth planning

Ensuring the continuance of your family wealth.

### Wealth structures

Structuring your wealth for the long term.

### Superannuation

The right approach to your superannuation planning.

### Investing and Portfolio Management

Investing your funds to reach your goals.

### Personal Insurances

Protecting what's most important.

### Retirement and exit

Accessing your wealth at the right time and in the appropriate way.

# Let's chat

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## Hywood Partners

Hywood Partners Pty Ltd trading as Hywood Partners  
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