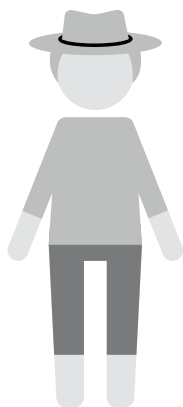


Avoid any possible financial pitfalls of a windfall



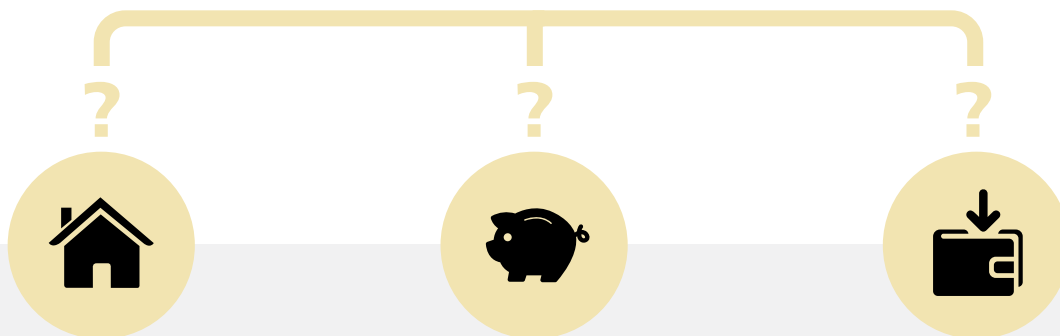
There are a number of life changes that can impact your retirement income – receiving an inheritance is a common one.

Our desire for certainty is a deeply human trait, and the emotional challenges of retiring can exacerbate this need. Receiving a financial windfall could boost your retirement income, but an inheritance could also impact your Age Pension.



Cameron is a 67 year old homeowner with modest super and assets – until he receives a sizeable inheritance.

Before speaking to his financial adviser, he wonders if he should...



Spend some of the money renovating his house to hopefully increase the resale value.

Put a chunk of money in a term deposit and the rest in a high interest savings account so it will be safe – even if it does impact his Age Pension.

Revisit his retirement plan to take advantage of his increased retirement assets to build a sustainable lifetime income stream.

Even events like receiving an inheritance may upset the status quo.

Contact me to find out how an investment in a lifetime annuity can provide you with income for life.

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