

Reviewing finances can be a stressful and overwhelming experience. Forcing people to think about their expenditure or face unexpected situations, financial planning for the future is an important task that should be personalised.



MAGENTA FINANCIAL PLANNING



With a combined 43 years of financial planning experience, Magenta Financial Planning has the experience and industry accreditations to provide quality financial advice for clients from all backgrounds.

Security, reassurance and happiness are at the heart of Magenta's philosophy. Chief Executive Julie Lord and Managing Director Gretchen Betts are dedicated to providing lifestyle financial planning, and this ethos of happy clients and staff is key to their business success.

Magenta focuses on a personalised service for clients, helping them to plan their desired lifestyle for future security and happiness. Magenta sympathetically challenges a client's thinking to determine their goals and maximise their chances of achievement. Clients rely on Magenta to deal with dreaded 'what if' situations, and help them to proactively prepare for events that often lead to an uncertain financial future.

This feeling of uncertainty was at the heart of a recent divorce settlement case. Cynthia approached Magenta when Tony, her husband of 32 years, told her he wanted a divorce. She was resolved to sort things out amicably and asked for advice.

Cynthia needed to know how much she required from her settlement to live comfortably for the rest of her life. Cynthia and her husband had owned a business for over 25 years, a role she had never particularly enjoyed. A divorce would give her freedom.

By assisting Cynthia with a lifetime cash flow forecast, Magenta showed her exactly how much money she would need to live, providing her with the reassurance she needed for future security, despite the change in circumstances.

Magenta's high-quality advice mapped out Cynthia's lifestyle preferences and concerns, ensuring that she had suitable emergency contingency funds and guidance regarding investment options.

Magenta's expertise brought reassurance at a time of immense stress and uncertainty. Cynthia has since referred her parents to Magenta to ensure that their affairs are in order and mitigate any potential inheritance tax.

Julie and Gretchen pride themselves on their extensive financial expertise, and the happiness, reassurance and peace of mind that they can bring to all their clients, whatever their financial dilemma.

“Magenta focuses on a personalised service for clients.”

Magenta Financial Planning

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