

# 'New' Financial Planning update

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**Sydneyone Property** and **Ocean Wealth Solutions** and have recently come together as corporate partners. The partnership has been established to better service your needs and to ensure we are doing all we can to keep you well informed of recent legislation changes.

Kade Anthony from Ocean Wealth Solutions will provide regular updates in our newsletter which will include; recent insurance case studies, changes to superannuation, tax effective strategies for retirement planning and Investment planning for the future.

Ocean Wealth Solutions is located in Caringbah; the business is an Authorised Representative of Charter Financial Planning Limited and offers a selection of almost 400 products sourced from over 40 fund managers and life insurance companies. What this means to you is that Ocean Wealth Solutions can offer a range of insurance, investment, superannuation and retirement income stream products that will be unique to your circumstances without being tied down or influenced by one.

Kade has a hassle free approach to making sure you and your family are protected for the future and on the right track to retirement. He will make appointments at your home, work or alternatively at his office location at a time that best suits you.

As a part of our corporate partnership Ocean Wealth Solutions is offering a complementary first appointment for a meet and greet. This is to review your current superannuation and insurance products and to ensure that what you have in place is relevant to your needs today.

To take advantage of this appointment please email [kade@oceanwealthsolutions.com.au](mailto:kade@oceanwealthsolutions.com.au) or call 02 8208 5998 and quote '**Sydneyone Property**'.

You can also visit the website [www.oceanwealthsolutions.com.au](http://www.oceanwealthsolutions.com.au) for more information on the services they offer.

Sydneyone Property would like to welcome Ocean Wealth Solutions to our newsletter and we are looking forward to a successful partnership and the 'Insurance Case Study' in our next edition.