



Our offer to Pre-Retirees

At Bellwether Wealth Strategists we believe that planning for retirement should not be viewed as the end of a life-stage, but rather, the exciting beginning of a new one. With over 30 years of combined experience in formulating life changing strategies for our clients, we also understand that planning for retirement is often seen by many as overly complicated, full of jargon and time consuming. However, the choices you make today will determine your options tomorrow.

At Bellwether Wealth Strategists, our primary aim is to help you with your choices at every stage of your own financial journey so you feel in control.

We do this by:

- Giving you the confidence, knowledge and access to our expertise to make smart financial choices, and avoid poor ones.
- Being a sounding board you can trust.
- Giving you control over your own financial journey.

As a valued client, you are at the centre of everything we do. Through our highly personalized and consultative advice process we help our Pre-retiree clients, like you:

- Visualise and plan your future beyond work
- Balance your lifestyle priorities and risks
- Educate you on lifestyle choices for your retirement
- Capitalise on legislative and tax opportunities
- Ensure you are on top of your debt(s)
- Work hard on your financial checkpoints

Let our highly experienced team help you defeat your financial fears, overcome your financial frustrations and make your aspirations possible. Contact us today.

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Bellwether Wealth Strategists

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