

A photograph of a person riding a bicycle through a tall pine forest. The trees are thin and vertical, with some showing signs of autumn. The lighting is soft, suggesting early morning or late afternoon. The person is in the lower middle ground, riding away from the viewer.

# ZEAL WEALTH

Ignite Your Wealth. Secure Your Future.

[www.zealwealth.com.au](http://www.zealwealth.com.au)





## CEO's Message

At Zeal Wealth, we recognise that wealth creation is just the first step. True success lies in the preservation, growth, and seamless transition of the wealth to future generations. Our unwavering commitment to strategic risk management, paired with a deep understanding of the dynamic financial landscape, ensures that your legacy endures.

We work alongside you to secure your wealth and empower future generations, enabling them to thrive and continue the foundation you have built.

Together, we will navigate a journey that spans generations, protecting what matters most and ensuring lasting impact.

Welcome to Zeal Wealth come on where your legacy is our priority.

Leslie Brown  
CEO | Financial Adviser  
SMSF Specialist Advisor





# About Us



At Zeal Wealth, our mission is to empower individuals and families to achieve financial security and prosperity through personalised, transparent, and expert financial planning solutions. We are committed to delivering exceptional service, fostering trust, and providing measurable results.

Our dedication to integrity and client-centric advice ensures that every financial decision we guide is made in the best interest of our clients, helping them to build and preserve wealth for a secure future.

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# Our Philosophy

Our philosophy at Zeal Wealth is rooted in passion and purpose, guiding your financial journey with zeal through five stages—from seed to harvest—ensuring lasting growth and legacy



## SEED

The journey starts with a tailored plan and an initial investment, planting the foundation for your financial future.



## GERMINATION

As the seed begins to grow, we work together to invest consistently, refining strategies to fuel capital growth and align with your goals.



## GROWTH

Your wealth begins to flourish, and we continuously adapt and diversify your strategy to ensure sustainable growth and financial stability.



## MATURITY

Like a fully-grown tree, your portfolio becomes robust and resilient, positioned for long-term success and generational wealth.



## HARVEST

In this stage, we focus on drawing from your accumulated wealth, ensuring you can achieve your financial goals and enjoy the fruits of your planning.



## WHAT WE DO

### **Financial Planning**

We create comprehensive financial strategies tailored to your unique goals. Whether your objectives are short, medium, or long-term, we guide you in achieving them, providing clarity on your financial journey every step of the way.

### **Wealth Management**

We focus on enhancing your wealth through strategic portfolio management, capital growth, and income generation. Our approach includes unique investment opportunities in non-market correlated assets like art and watches, ensuring your wealth is diversified and positioned for growth.

### **Self-Managed Super Funds (SMSFs)**

Self-Managed Super Funds (SMSFs) offer a high degree of flexibility and control over your retirement savings. We assist in the setup and ongoing management of SMSFs, ensuring compliance with regulatory requirements and optimising the performance of your fund. Our comprehensive services are second to none and are specialist accredited.





## **Retirement Planning**

Our retirement plans are customised to your personal financial situation, goals, and risk tolerance. We model various retirement scenarios, considering factors like investment returns, inflation, and your future needs, to help you secure a stable, income-rich retirement. We also optimise income from superannuation, pensions, investments, and more, to maximise tax efficiencies and ensure financial security.

## **Estate Planning & Succession**

We help you protect your legacy with strategic estate planning that ensures your wealth is passed on efficiently. Our solutions minimise tax implications and provide peace of mind knowing that your wishes will be honored, even as your circumstances change.

## **Insurance Solutions**

We offer tailored insurance solutions to safeguard your financial future, protecting you, your family, and your wealth from unexpected events. With the right coverage, you can approach the future with confidence.

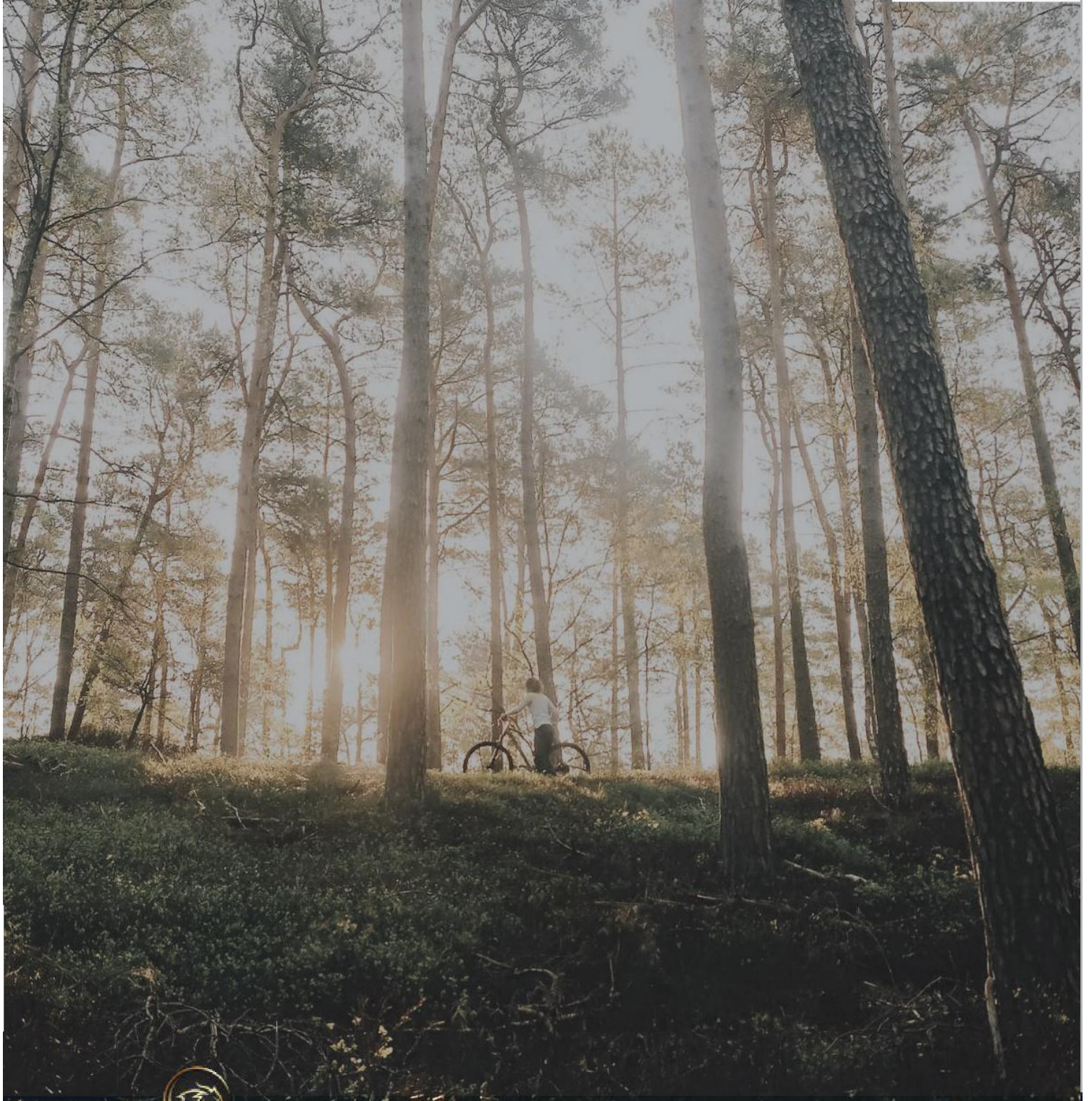


## WHY CHOOSE US AS YOUR FINANCIAL ADVISER TEAM

Choosing the right financial adviser is a crucial step towards securing your financial future, and here's why selecting us makes sense.

- As a sole operator adviser firm, we pride ourselves on providing a highly personalised experience that sets us apart from larger firms.
- You will not be passed between advisers; you will work directly with someone who knows you and your goals.
- We bring a wealth of experience to navigate complex financial situations. Crafting customised solutions that align with your unique circumstances is our priority.
- We prioritise clear communication and a straightforward fee structure. You can reach out directly to the owner and our team for support, ensuring you feel valued.
- We provide exceptional service and fostering strong client relationships. Choose us as your partner to turn your financial aspirations into reality with trusted guidance.





## ZEAL WEALTH

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