Private Wealth Management for *Medical Professionals*

We look after your **financial wellbeing** while you're busy looking after the **wellbeing of others.**

VISIS
Private Wealth

The *trusted* **adviser** to:

- Health Care Executives
- Medical Specialists
- Practice Owners
- General Practitioners
- Pharmacists
- Orthodontists & Dentists
- Medical Researchers

Specialist knowledge

You work with an experienced Private Wealth Adviser who understands your unique requirements, challenges and opportunities as a medical professional.

Tailored solutions

Your financial strategy is tailored for you – shaped by your aspirations and goals; and backed by the expertise, insight and experience that ensures you achieve them.

Expert care

We're on top of it so you can make great decisions, on a sound basis, at the right time to capitalise on opportunities and optimise your financial position.

Ethical advice

We're 100% privately owned and licenced. This means we work for you – not a bank, fund manager or insurance company.

Peace of mind

You're free to focus your time and energy on your patients and your practice, knowing your finances are being taken care of by experts.

Because *only the best* **will do**

VISIS Founding Partner Chris Smith is one of Australia's top financial advisers. As your personal Private Wealth Adviser, he is dedicated to helping you manage, grow and protect your wealth so you can achieve your career goals, and enjoy the lifestyle your wealth affords you.

- **2017, 2018, 2019 & 2020** – Barron's Top 50 Financial Advisers
- **2019** – Finalist – Holistic Adviser of the Year, Investment Adviser of the Year and SMSF Adviser of the Year – IFA Awards
- **2018** – Finalist – Certified Financial Planner® of the Year – FPA Best Practice Awards
- **2018** – Investment Adviser of the Year – ifa Excellence Awards
- **2018** – SMSF Adviser of the Year – ifa Excellence Awards

Chris Smith
Partner

Manage your wealth today, **plan for tomorrow**

You've worked hard to get where you are in a demanding profession that can be both personally and financially rewarding. But it's true, managing your financial affairs as a medical professional can be complex and time-consuming, and a distraction from the focus and energy your career requires.

Private Wealth Management is an effective way to gain financial clarity and control and find the all-important balance between investing in your career and supporting your personal and lifestyle goals, now and into the future. It offers a highly personalised, seamless and coordinated approach to managing every aspect of your financial wellbeing – from wealth creation to investment management, insurance and risk management, superannuation and retirement planning to accounting and tax services.

Take *care* of **business**

Health care is a vocation, but in today's world, it's also a business. We offer specialised medical accounting services that support you to manage the business side of things. Our accountants work closely with your Private Wealth Adviser to ensure your accounting and tax affairs are professionally managed and your financial position is optimised.

Effective *wealth management* demands a **holistic** approach

Our *services*

A complete suite of services covering all of your wealth management needs.

Strategic Financial Advice

- Wealth creation
- Capital protection & preservation
- Personal insurance
- Taxation planning
- Retirement planning
- Superannuation including self-managed superannuation funds

Investment Management

- Investment strategies
- Asset allocation advice
- Bespoke portfolio construction
- Risk management
- Superannuation strategies

Accounting & Tax

- Tax advice
- Business consultancy
- Investment structures & entities
- Tax management strategies
- Bookkeeping
- Cash flow strategy & management
- Self-managed superannuation funds
- Tax returns

Your path to financial *wellbeing* starts here

Get in touch with Chris today

Brisbane (07) 3231 4004
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visis.com.au

VISIS Private Wealth