

# HAVE YOU ALWAYS WANTED TO KNOW MORE AND NOT SURE WHERE TO START?

## WHO ARE WE?

At Thomas Group Financial Services we work with you along the way on life's journey. Whether you are getting married, starting a family, embarking on the trip of a lifetime or planning to enjoy your years after work, we can help. It all starts with understanding exactly what it is you want to achieve. We will then create your financial plan to help you get there.

## PACKAGES FOR ONGOING ADVICE AND RECOMMENDATIONS

### Bronze

This package is appropriate for someone who is looking to establish themselves and want to gain a deepened understanding of how to build up their assets and look at their options, to allow for financial security. We help you track against your goals, and check your investments are tax effective.

### Gold

This package is suitable for an individual who is more likely to be retired or approaching retirement. They have accumulated assets and would like to know how to structure their income now they are no longer working.

### Platinum

This package is best suited to an individual who has significant investments with complex tax implications. They may have a family superfund, family trust or have accumulated significant savings to be managed.



## CONTACT

Suite 4A, 4 Belgrave St  
Kogarah NSW 2217

(02) 9553 9293

[clientservices@thomasmgroup.com.au](mailto:clientservices@thomasmgroup.com.au)

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



@Thomas Group Financial Services

## TESTIMONIAL

"Peter is a professional and extremely knowledgeable financial adviser. He always provides well-structured, timely and transparent advice. Peter's personal approach and extensive financial knowledge means I feel confident and secure with my financial matters and have no hesitation recommending him to my family and friends."

**Barbara**

- Allawah

**We will help you track against your goals, find ways to achieve your goals faster and check your investments are tax effective. We will provide you with comprehensive recommendations and options which we will review each year with you.**