

Chris and Andie

Starting young

When Chris first met David in 2002, he was in his mid-20s and looking to build his wealth as quickly as possible. At the time, Chris was keen to get into geared investing and had been dabbling with some self-directed investment tools.

Although Chris had a bit of financial knowledge, he was overwhelmed at the investment options available. Chris spoke to David about his goals, and together they developed an investment strategy that would put Chris on the path towards achieving them.

“When David and I started working together, I had no mortgage, debts or dependants and no significant other, so my financial plan was pretty straightforward,” Chris said. “It mainly involved a lot of methodical gearing and paying it down, then buying when there were dips along the way – it all worked really well.”*

In 2004, while working in San Francisco, Chris became engaged to a fellow Aussie, Andie, and they made a plan to return to Australia. Two years later Chris and Andie arrived in Sydney to get married and buy their first home together.

David helped Andie get her financial house in order, by arranging income protection and life insurance as he'd previously done for Chris, and encouraging Andie to consolidate her super into a single account. All the while, he continued to keep a close eye on the couple's investment portfolio to make sure their finances stayed aligned to their lifestyle goals.

“I'm confident with David because I know he wouldn't get me to do anything that he wouldn't do himself,” said Chris. “He uses the same tools and platforms as us – and if it's good enough for his money, it's good enough for ours.”

Zero money stress

Now that he's married and has a young daughter, Chris's priorities have changed from when he first started investing in



Chris and his family

his 20s. And although he's come a long way in his financial literacy journey, he's pleased to have David as his adviser. In particular, Chris appreciates that David helps him understand how changes to the financial landscape might affect him and his family.

Chris commented: “One of the biggest benefits of working with David is his ability to explain complex financial issues in a way that's digestible to us. He's always able to answer my questions whenever legislation changes and it's good to know there's someone we can trust to seek counsel from as we hit different life stages.”

With David in his corner, Chris knows that wherever life takes him and his family next, they're in a good financial position to make the most of it.

“It's all about financial freedom,” Chris said. “Andie and I have zero money stress, and that's largely because we have absolute confidence that we're doing all the right things.”



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