

Matt and Sue

When Matt and Sue first met with David Kissane in 2000, they were in their early 30s and expecting their second child. Matt was a partner in a physiotherapy practice and also a part-owner in a martial arts school, and he wanted guidance on building wealth for the future.

David advised Matt and Sue to restructure their debt so they could diversify their assets by investing in shares.* But first, David made sure they were comfortable with his recommendations.

“We filled out questionnaires so David could find out what kind of investors we are,” Matt said. “Sue is slightly conservative whereas I’m willing to take on a bit more risk, so he advised us to take a middle ground rather than investing aggressively.”

Under David’s guidance, their investments have grown steadily over time. During market downturns when many investors have cashed in their investments, David has encouraged them to stick with their long-term strategy. He even advises them to take advantage of low share prices and build their portfolio further.

“Whenever we see David he always gives us evidence to back up his advice,” said Sue. “We always feel confident about what he’s advising us to do.”

Holistic financial planning

David regularly reviews their financial strategy, and updates it to meet the family’s changing needs. Matt also asks David’s advice on business decisions that could affect their financial position.

“We’ve had a lot of growth over the years, so it’s great to have someone to call up and run ideas by,” Matt explained.

David keeps Matt and Sue informed of changes to superannuation rules, so they can maximise their contributions while they’re still working. He also keeps an eye on the couple’s personal insurance to make sure their levels of cover are suitable for their needs and lifestyle.



The family on safari in South Africa

In 2010, when Matt sustained a back injury and had to claim on his income protection insurance, David guided him through the claims process and helped make it as smooth as possible.

Matt commented: “Overall, we had a positive experience with the insurer. It was great having David on our side to represent us – he knew all the right questions to ask.”

Today Matt and Sue are in a strong financial position and on track to achieve their long-term goals. Along the way, they’ve also been able to give their children a private education and travel the world as a family – and they still have plenty of adventures on the horizon.

They’re grateful for David’s support and expertise in getting them to where they are, and they look forward to continuing their journey with the team for many years to come.

“David and the team are very professional, but also vibrant and friendly,” said Matt.

“When we walk into the office, we never feel like a number or just another client,” Sue added. “They have a real personal touch and we know we can contact David and the team whenever we need them.”



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