How your financial adviser and solicitor work together

HER BEST MOVE NOW · PROFESSIONAL PATHWAYS

FINANCIAL ADVISER	SOLICITOR

Considering Separation

Financial adviser

STEP 1
Initial conversation at no cost
15 minutes · online · no obligation to proceed

STEP 2
Your financial picture at no cost
Assets, liabilities, superannuation · what separation could mean for you financially · scenario modelling

DECISION TO PROCEED WITH SEPARATION

Solicitor

STEP 3
Initial conversation at no cost
15 minutes · online · no obligation to proceed

STEP 4
Your legal position
Rights and entitlements · the legal framework · what to do before any announcement is made

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Separating Finances

SOLICITOR

STEP 1
Initial conversation at no cost
15 minutes · online · no obligation to proceed

STEP 2
Disclosure & the full picture
Legal obligation to disclose · identifying gaps · formal requests where needed

STEP 3
Your legal entitlements
What the law says · establishing your negotiating baseline

FINANCIAL ADVISER RE-ENTERS — BOTH PROFESSIONALS NOW ACTIVE

FINANCIAL ADVISER	SOLICITOR
STEP 4 **Modelling your options** Short, medium and long-term modelling of options, proposals and counter-proposals · lifestyle, housing, cashflow, superannuation, retirement	STEP 4 **Negotiation** Opening position · legal strategy · managing the process
STEP 5 **Reviewing proposals** Financial stress-test of all options under consideration · short, medium and long-term implications	STEP 5 **Reviewing proposals** Legal assessment · your entitlements versus what is on the table
STEP 6 **Final review** Confirm the full financial implications of the agreed settlement — before you sign	STEP 6 **Formalising the agreement** Consent orders or binding financial agreement · legally binding and enforceable

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Planning Retirement

PRIMARY

Financial planning

Superannuation, income, Age Pension, retirement structure · government pension integration · the full financial picture

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WHEN NEEDED

Estate planning

Will · Enduring Power of Attorney · superannuation beneficiary nominations