



WELCOME TO FCA.
YOUR LIFE. YOUR GOALS.
OUR GUIDANCE.



FCA
financial

Personal Insurance | Superannuation | Financial Planning

LOOKING AT THE BIG PICTURE

Everyday life can be so busy. Between work, family and social commitments it can be hard to sometimes see things from a wider perspective. Like planning for your long-term future and supporting your loved ones. What will happen if you can't work due to illness or injury? How will you fund your retirement? What will happen to your estate?

When it comes to something as important as securing your financial future, working with a professional adviser is the best decision you can make. We'll help you pinpoint your specific goals and objectively review your finances – providing you with a clear and realistic plan to help achieve those goals.





SECURE YOUR FINANCIAL FUTURE WITH CONFIDENCE

At FCA Financial, we are committed to helping you achieve your financial goals through personalised, professional advice.

Our mission is to help empower you to navigate your financial future with confidence and certainty by delivering strategies tailored to your individual circumstances and aspirations.

OUR SERVICES

We offer a comprehensive suite of financial planning solutions, including:

- ✓ Wealth Creation Strategies
- ✓ Superannuation and Retirement Planning
- ✓ Estate Planning
- ✓ Personal Insurance
- ✓ Business Succession Insurance

Whether you're starting your financial journey, planning for retirement, or protecting your loved ones, we provide the tools and expertise to support your success.



GUIDING YOU WITH CARE AND CLARITY EVERY STEP OF THE WAY

Personalised Advice

Every plan is tailored to your unique goals, values, and financial situation.

Experienced Guidance

Our team of experienced industry professionals is led by Clinton Teitz, who brings over 25 years' experience in personal insurance, superannuation, and retirement planning.



Lifelong Partnership

At FCA Financial, we understand that your financial needs evolve over time. That's why we take a life-stage based approach—offering relevant, personalised advice to help you build, protect, and enjoy your wealth at every phase of life, adapting your plan as your needs change.

LIFE STAGES ROADMAP – HELPING YOU ACHIEVE YOUR FINANCIAL SECURITY

Stage 1

Starting Out – Building Foundations

Laying the groundwork for financial success

- Budgeting and saving strategies
- Starting your super and investment journey
- Establishing financial goals
- Basic insurance protection

Stage 2

Building Momentum – Family and Financial Growth

Growing and protecting your wealth

- Growing investments and super contributions
- Buying a home or investment property
- Income protection and family insurance
- Saving for children's education
- Establishing an estate plan

Stage 3

Consolidation – Growing with Purpose

Maximising your financial position and preparing for retirement

- Boosting super contributions and tax strategies
- Reviewing debt and investment strategies
- Planning for business succession (if applicable)
- Ensuring adequate insurance and estate planning



Stage 4

Pre-Retirement – Planning the Transition

Making your final working years count

- Transition to retirement strategies
- Accessing super and income stream planning
- Minimising tax in retirement
- Finalising estate planning and wills

Stage 5

Retirement Lifestyle and Legacy– Living Your Plan

Enjoying financial freedom with peace of mind

- Managing retirement income streams
- Centrelink and government entitlements
- Protecting wealth for future generations
- Estate distribution and intergenerational planning



OUR PROCESS: SIMPLE. CLEAR. STRATEGIC.

01

02

03

04

Discovery

We listen and learn about your goals.

Financial Health Check

We assess where you are today.

Tailored Strategy

We create a custom plan aligned to your future and goals.

Implementation and Review

We guide you through execution and offer ongoing reviews to keep your plan on track.



LET'S PLAN YOUR FINANCIAL FUTURE – TOGETHER

