



FINANCIAL PLANNING FOR YOUNG PROFESSIONALS



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Financial planning isn't just for retirement. Being in control of your finance can help you live the life you want, setting you up for both now and the future.

At Life Money Co, we're focused on a younger generation and making financial freedom accessible to a new audience. For Life Money Co, this is the mantra on which we've focused our business. This makes us not your typical financial planner.

We've built a different approach that starts with your objectives and the behaviours you have towards money. We'll help you refine those behaviours that are key to your future financial success. We know it's more than just the numbers and we have a proven methodology to help you create a better financial future.

Our two- phase methodology for your financial future

Our methodology is what underpins our entire approach and is something we use with every member of the Life Money Co community.

It breaks down into two key phases:



EFFECTIVE (Why and What)

For us, this is all about understanding you. We want to know what you want to achieve in life, as your life goals will drive your financial ones. By understanding your aims in life, we can help create meaningful objectives for your finances.

EFFICIENT (How and When)

This is where our advice comes in. We will work out the most efficient way to help you reach your goals. We'll look at your income, where you spend it, and which behaviours you need to adopt or change to help you get there.

How we can help you

We offer a range of financial services that can be tailored to your specific needs:



Goals and value based advice



Superannuation options including self managed funds



Investing your money



Better cash flow management



Help in finding the right mortgage



Understanding what insurance you need

How we can work together

Life Money Co is focused on helping motivated individuals to do better. We offer three different levels of service, giving you the tools to suit your specific requirements.

FOMO

Suitable for those looking to start their financial journey and improve awareness.

ENGAGED

Have bigger goals in mind and the resources to make it happen? Now you want accountability.

EMPOWERED

Suitable for the heavy hitters who have big goals and the determination to reach them.

Engagement process

All our packages start with a review of your beliefs, behaviours, and lifestyle goals.

What you'll get:

- A financial strategy tailored to your specific needs
- Advice and ongoing support on all elements of your plan
- Support via online tools
- One strategy review per year

What you'll get:

- A financial strategy tailored to your specific needs
- Advice and ongoing support on all elements of your plan
- Quarterly reporting, looking specifically at your cash flow and behavioural change
- Twice-yearly strategy reviews
- Support via online tools

What you'll get:

- A financial strategy tailored to your specific needs
- Advice and ongoing support on all elements of your plan
- Monthly reporting, looking specifically at your cash flow and behavioural change
- Quarterly strategy reviews
- Support via online tools

JOIN OUR COMMUNITY

For us, the ability to connect like-minded, driven individuals is one of the great benefits of working at Life Money Co. Our members are motivated, capable and optimistic.

We see our members as part of a community, one driven to achieve the life goals that they want by taking charge of their finances. That's the same mindset that our team has. We see it from the perspective that we're all on the journey together.

It's a different way of financial planning, designed for your generation.



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