ACRO WEALTH MANAGEMENT

We provide a variety of services and solutions to grow and protect our clients' financial wealth. With our customised financial advice, we aim to help our clients to ultimately enable their money to work for them effectively.

Portal Office Park Unit 5A, 2994 Logan Rd,
Underwood Qld 4119

Level 6, 200 Adelaide St,
Brisbane Qld 4000

enquiry@acrofs.com.au
(07) 3341 4658
www.acrofs.com.au

ABOUT US

Our goal is to be your trusted adviser in your individual financial planning journey.

Acro Wealth Management was established in 2016 as a sister company to Acro Accounting & Financial Planning (established in 2003). With a large need from clients for assistance with their personal finance matters, a separate service was created to focus efforts and better assist with our valued clients' individual situations.

Acro Wealth Management is a group of finance experts and accountants led by Mohammed Saheed ***FCPA, CTA, FIPA, MPA, AFP®, DFS (FP).***

Our team is committed to helping our clients secure a better future through personalised advice and customised plans.

Our Vision

To be the leader in financial planning industry, promoting sustainable and feasible strategies to our clients through our expertise in financial consultancy services while creating a better financial environment that motivates our clients to have a prosperous life and a secured future

Our Mission

Dedicated in providing excellent individual financial planning solution, with the pledge of giving satisfaction, opportunity and wealth to our clients through our holistic financial planning strategies and highly professional approaches

Why are we different?

Personalised Advice

At Acro Wealth Management, we go through a process which allows us to truly understand your financial goals and needs. We then prepare personalised and tailored financial plans to help achieve your financial goals in a more efficient and effective manner.

Prompt & Proactive

We pride ourselves in providing our clients with a prompt and proactive service. Whether it is keeping you informed with law changes or identifying opportunities to help grow and protect your wealth, we make sure that we always innovate.

Qualified & Experienced Financial Advisers

Our team of experienced and qualified financial advisers have over 15 years of financial planning experience. This ensures that we provide financial advice that is clear, comprehensive, and always in the best interests of our valued clients.

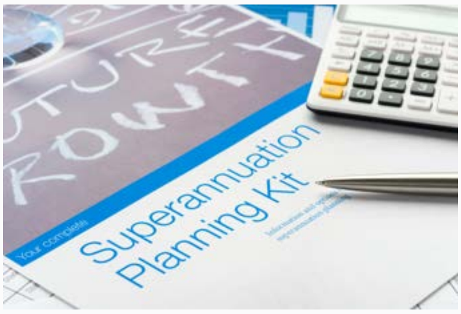
One Stop Solution

Our holistic approach and service offering allows us to take care of all your financial planning needs whether that is superannuation, investments, insurances, or even legal services. At Acro Wealth Management, we can cater for all your financial needs.

OUR SERVICES

SMSF Advice & Investment Strategy

Here at Acro Wealth Management, we will assess your situation and recommend the best SMSF structure to meet your retirement needs. Whether you are looking to set up your superannuation to invest in property, shares, gold or other collectables, our team will ensure that the SMSF set up, strategy and ongoing administration is suitable for your needs and legally compliant.



Superannuation & Retirement Planning

Even if you are far from retirement age, it is vital that you start looking into how you can maximise your super fund and secure a desired lifestyle in retirement. We can help you with all your superannuation needs: choosing your super fund; superannuation consolidation; investment; and increasing your super. If you have reached retirement age, we can help you to access your super in the best tax effective manner.

Tax Minimisation Strategies

Tax minimisation is an important part of creating extra wealth and a successful financial plan. With the use of different strategies, you could save yourself a considerable amount in each year. Our team of accountants, tax specialists and financial advisers have over 20 years of experience and specialise in structuring your investments and income in the most tax effective manner.

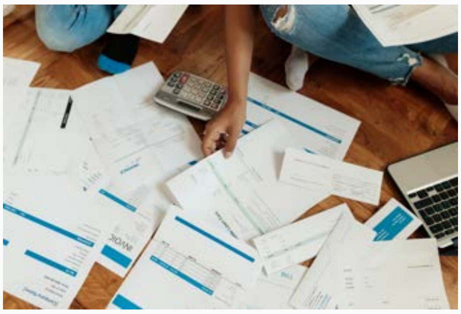
Cash Flow and Budgeting

At Acro, we take the time to assess our client's individual financial circumstances and help put together an achievable budget. Creating and sticking to a realistic and achievable budget is vital in ensuring that your cash flow is allocated correctly to help you meet your financial goals. We can help you with: spending plan; budget creation; debt reduction; and wealth sustainability.

Investment Advice

Investing in different assets can be a great way to grow your wealth and help to shape the lifestyle you want to live. At Acro, when providing investment advice, we plan, research and diversify your investment portfolio to help you find investments that fit your risk tolerance and investment time frame to ensure you reach your financial goals sooner.

OUR SERVICES



Debt Management

Our advisers can help put in place debt management strategies to quickly and efficiently tackle your debt situation, and significantly reduce the amounts of debt that you may owe. It is important to have an effective debt management plan, especially when interest rates and extra charges can significantly increase how much you must repay.

Life Insurance Covers

Our team work closely with clients to not only recommend the adequate levels of insurance needed, but also to educate and help clients understand each type of insurance cover and how they work. We create a protection plan, that is tailored to your financial situation, taking into account your assets, income and liabilities. Our team will conduct periodic reviews to ensure policies in place are still suitable under any new circumstances.

Centrelink & Age Pension Advice

We understand that our clients who are getting ready for retirement or are already in retirement may need some form of financial assistance through the Age Pension. This is why, we have established a service that will ensure we are able to maximise your Age Pension entitlement to supplement your investment income.

Estate Planning

Wherever life may take you, change is the only constant. Yet most people never formally update their plans when things change. More than half of Australians fail to adequately adjust their plans after changes or milestone events in their lives. Acro Wealth Management is here to make that process simple and efficient. You may visit our Estate Planning page to learn more.

Our Certification and Technology Partners

FPA FINANCIAL PLANNING ASSOCIATION of AUSTRALIA

Lifespan FINANCIAL PLANNING

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