



SUPERANNUATION | INVESTMENT | LIFE INSURANCES | RETIREMENT PLANNING



Creating long term partnerships with you and your family, as your trusted adviser to educate, develop and review strategies supporting financial and personal lifestyle choices.



HOW WE CAN HELP YOU

At Tomich Financial Group, we partner with you to help with your wealth accumulation, wealth management, wealth protection and wealth transfer needs.



OUR BUSINESS

Tomich Financial Group is a leading financial services provider partnering with you to plan strategies that allow you to make informed decisions and take control.

We partner with you, your family and other trusted professionals to secure each generations financial future.

Our business is focused on you.



Founder and Director - Tracey Tomich

ABOUT TOMICH FINANCIAL GROUP

Tomich Financial Group are qualified in personal insurance and financial strategies.

Our commitment to ongoing professional development and education ensures you have the most up to date technical knowledge and advice specific to your needs.

Our experience and knowledge ensures you are educated and understand all your options, so you can make informed decisions for you and your family.

We observe a strict and comprehensive Code of Professional Conduct and are subject to stringent compliance and audit guidelines.

OUR PROMISE TO YOU

At Tomich Financial Group our aim is to partner with you and your family to educate and develop personal strategies to achieve your lifestyle choices.

We provide you with a personalised plan that will help create and protect your wealth over the long term, while dealing with your day to day financial needs and challenges.

Our commitment to you is service and education. Our qualifications and experience provide options for your lifestyle choices. Quality strategic advice allows you to make informed decisions and take control.

OUR PEOPLE

Financial Adviser Tracey Tomich began working in the financial services industry in 1993.

Tracey is recognised as a:

- Certified Financial Planner®
- SMSF Specialist Advisor™ (SSA™)
- Certified Practising Accountant - Financial Planning Specialist (CPA (FPS))
- Diploma of Superannuation Management,
- Bachelor of Business (Accounting), graduating from LaTrobe University of Northern Victoria.

Tracey Tomich is the founder and Director of Tomich Financial Group, which was established in 2013, to provide customised and personal financial, insurance and investment advice.

Tracey owned and managed a successful financial planning business in Brisbane prior to a lifestyle change to the Sunshine Coast.

Tomich Financial Group focuses on education and partnering with you and your family to make informed personal and financial lifestyle choices.



OUR ADVICE PROCESS

What you can expect..

At the beginning of the advice process we encourage you to be open and share information about your current financial situation.

It is also important that you consider your financial and personal goals prior to your first appointment so we may discuss and clearly identify your lifestyle choices and resulting financial goals, which will help with the development of your financial plan.

Your goals should be clear, concise and measurable—but most of all realistic and achievable.

Some typical goals may include..

- Protecting my income and assets for my family, should an unexpected event occur
- Paying for children's education
- Sufficient assets to retire at age 60 on 75% of my current wage
- Owning my home and having an investment portfolio worth \$500,000
- Ensuring my assets are transferred to my family when I pass



OUR COMMITMENT TO YOU

It is difficult to predict if and when circumstances may change, and more difficult to keep up with frequently changing legislation and its implications. Tomich Financial Group provide review and management services for your strategy to ensure your plan stays in pace with your life changes.

WORKING WITH TRUSTED PROFESSIONALS

Tomich Financial Group are committed to working with your other trusted professionals, where appropriate, to help deliver confidence and peace of mind to you and your family.



**EDUCATION AND
PARTNERSHIP,
A JOURNEY FOR
LIFESTYLE CHOICES.**



If you have any questions, or would like to make an appointment, please contact us on:

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