

CAPABILITY STATEMENT



“WHATEVER YOUR FINANCIAL CONCERN
OR OBJECTIVE MAY BE, WE CAN ASSIST IN
FINDING A SOLUTION.”

Fionne McKillop
Principal Financial Planner



ABOUT US

We have a long history of providing quality advice and excellent service to our clients. Since 1985, we have assisted many clients in achieving their financial and lifestyle goals.

Our Services

We provide superior holistic financial planning advice covering every aspect of your finances including:

-  Personal Insurances
-  Investment
-  Estate Planning
-  Superannuation
-  Wealth Creation
-  Retirement Advice
-  Asset Protection/Structuring
-  Business Succession

Our advice is tailored to ensure that your financial objectives can be achieved as your lifestyle, goals and needs change.

We also have an extensive network of professionals available to assist in all areas from real estate agents to lawyers, accountants to mortgage and finance brokers.

Let us help you create a financially secure future for you and your family.

KEY PEOPLE

Fionne McKillop

Fionne is principal financial planner at McKillop FP and was admitted to practice as a solicitor in 2001 after graduating with an Honours degree in Law and a Commerce degree.

After commencing legal practice in Sydney's CBD following selection by one of Australia's top law firms, Fionne became an Associate with 2 other national firms in corporate advisory roles and a Senior Solicitor/Corporate Counsel for a NSW State Owned Corporation.

Following the birth of her third child, Fionne commenced working at McKillop FP and gained a practical insight into the need to minimise tax, protect assets, grow wealth and consider business succession, retirement and estate planning issues.

Fionne also owns her own law firm, **McKillop Legal**, which provides general

commercial and personal legal advice, with a focus on probate, business succession and estate planning issues.

Lucy McKillop

Lucy has over 30 years of experience in providing financial advice to clients in Sydney, the Illawarra and the Southern Highlands

Lucy has seen the difference that good financial planning has made to our clients' lives and the lives of their families, particularly where a traumatic event has occurred.

Although Lucy is no longer an active financial advisor, she remains a director, provides guidance on various issues based on her years of experience and remains in contact with many of her clients as many of them they have become close friends.

Louise Toogood (nee Standaloft)

Louise is the friendly voice that our clients hear each time they call our office or walk into our reception.

Louise came to McKillop FP from a background in financial practice management and has in-depth knowledge of our XPlan practice management software, ensuring smooth management of client files to minimize costs, reduce delays and enhance the overall McKillop client experience.

Louise is also a NSW Justice of the Peace.

WHY CHOOSE US?

We are great at what we do

We have been established since 1985. After 30 years in business, we have the depth of knowledge and experience that clients expect and require of a trusted advisor. We understand the highs and lows of business and how markets react so you can rest assured that we have things covered.

We care

With our boutique structure and clientele, we can take the time to really understand our clients, their family and what they really want from a financial advisor, allowing us to provide holistic personalized advice throughout their journey to financial success.

Exceptional service

Our clients always come first. From the minute a client walks in the door, they know that we really care about them and their finances and they feel confident that we have their best interests at heart.

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EXPERTISE

Investment & Wealth Creation

We can advise on the types of investments that are suitable for you depending on your goals and timeframe, whether they be real estate, direct shares, managed funds, investment bonds, self-managed super funds or term deposits.

Superannuation & Retirement Planning

No matter what stage of your life you are at, investing in your superannuation as early as possible reaps the greatest rewards. We can advise on a range of superannuation solutions to help achieve your goals and accumulate wealth over time, so that when the time comes, your retirement plans can be easily realised.

Personal Insurances

You cannot control the inevitable risks of life however, you can control how you prepare for them. Protect your family, your wealth and your earning ability by insuring yourself against death or diagnosis of a serious illness or injury to provide regular income to your family should you be unable to work.

Estate Planning

We provide a range of estate planning and business succession services including working with you and/or your solicitor to help you structure a tax-effective estate plan using testamentary trusts and other strategies (including appropriate structures such as trusts, superannuation and insurances) to help protect your assets from unnecessary taxation or the unwelcome claims of others.



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