



OUR STORY

JACQUIE: Successfully getting people into debt since 2000 😊 and identifying that we were living in an instant gratification society. With (frighteningly), no financial back up plans, safety nets, or even a proper understanding of personal financial situations beyond the loan transaction, I saw the need to fill the gap in mainstream financial service offerings to my clients.

“Nudged” by my clients’ needs, I become one of the first dual qualified Mortgage Brokers and Financial Advisers in Perth. Personally providing this holistic service, ensured all my clients’ financial needs were managed by one point of contact – making it easier for my clients to stay engaged and motivated, rather than being handled by, and hand balled to, multiple companies and losing that personal connection.

STEVE: I joined the team in 2013, with a strong background in logistics, retail, I.T. and management who jumped into the role of Captain and steered the ship in a new direction. A welcomed change as it allowed me more time to spend with my then 3yr old son.

Although I have taken a step back from mortgage broking, my new vital role as Business Manager along with following my passion for helping kids get a better start to life and undertaking study to become a teacher.

TOGETHER: We both have experienced the financial roller coaster of mortgages, kids, divorce, and understand financial literacy plays a fundamental role in success, (or should we say “survival”) in an ever-changing relationship landscape.

Since identifying that in recent years society was now becoming more responsible, and actually interested in learning how to do things themselves (but with the right guidance, and not full financial planning advice, or cost) we sold the planning business and developed an affordable service offering for individuals to feel comfortable and safe, asking those niggling questions they have previously may have felt too ashamed or thought they were too insignificant (feeling like just a “small fish”) to ask.

OUR MISSION

To provide individuals with a better understanding of “Grown-Up Money Stuff” - that we should have been taught in school - in a safe, relaxed, and affordable environment. To instil confidence, capability, and most importantly empowerment, to help fix or prevent financial struggles caused by divorce, domestic violence, or lack of decent financial role models while growing up.

SERVICES & PACKAGES

LENDING SERVICES

- ✓ Residential lending
- ✓ Car finance
- ✓ Personal loans
- ✓ Business lending



FINANCIAL COACHING

- ✓ Workshops: “Finance for Grown-Ups”
- ✓ Financial Freedom Academy: Self-Paced Online Program or Intensive with Dedicated Coach
- ✓ Hourly Coaching for Specific One-Off Needs

INSURANCES

- ✓ Loan Protection
- ✓ Home and Contents & Landlord

