



June 2018 - Knowledge Centre Newsletter

In this newsletter, we begin by providing you with information relating to the rules for accessing certain sources of income in retirement. Our animation illustrates the finer details of the Downsizing Measure. We explore personal insurances and the risk probability/impact matrix. We look at the relationship between saving motives and saving habits. And, Hamish and Andy provide a funny video, which serves as a good metaphor for the old proverb, *'If it seems too good to be true, it probably is'*.

Retirement age? Accessing sources of income

For many of us, retirement age (and how we intend to fund our retirement lifestyle) is often guided by the rules relating to the accessibility of certain sources of income, for example, superannuation and the Age Pension. In this article, we discuss these rules in further detail.



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Downsizing measure

From 1 July 2018, those aged 65 or over will be able to use the proceeds from the sale of their home, to make a downsizer contribution of up to \$300,000 each into superannuation (subject to complying with some finer details). In this animation, we take an in-depth look into the Downsizing Measure.



[Launch video...](#)

Personal insurances: The risk probability/impact matrix

Insurance, in general, can sometimes be seen as a 'grudge purchase' as there can be a perception of little tangible value (until claim time). In this article, we explore the risk probability/impact matrix to highlight the value of personal insurances when it comes to managing certain lifetime risks.



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The relationship between saving motives & habits

When it comes to saving habits, there are often three camps, regular savers, irregular savers and non-savers. Invariably, there is a relationship between saving motives and saving habits; however, external factors can sometimes be a disruptive force. In this article, we explore this relationship further.



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Scams: If it seems too good to be true, it probably is...

According to the ACCC's annual scam report, the total reported losses from scams in 2017 was over \$340 million. When it comes to scams, it's important to remember, '*If it seems too good to be true, it probably is*'. In this funny video by Hamish and Andy, we see some highly evolved primates at a zoo.



[Launch video...](#)

Disclaimer

This information is of a general nature only and has been provided without taking account of your objectives, financial situation or needs. Because of this, we recommend you consider, with or without the assistance of a financial adviser, whether the information is appropriate in light of your particular needs and circumstances



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