

In this month's newsletter, we begin by discussing the process behind determining an appropriate investment risk profile. Our animation illustrates the work test exemption, which provides additional flexibility for those aged 65 to 74 and wishing to contribute to superannuation. Running a successful, long-term business requires proper, ongoing management accounting; we look at financial statements within the context of household finances. Insurance premiums can vary considerably from one person to the next; we explore several of the underlying variables at play through the use of a case study. Lastly, we leave you with a video by Matt D'Avella, who shares how minimalism helped him with his personal finances.

Spotlight on investment risk profiles

Whether you are a wealth accumulator or retiree, determining an appropriate investment risk profile is important. In this article, we discuss the process behind this in further detail.

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Superannuation: Work test exemption (WTE)

Once you reach age 65, making voluntary contributions to your superannuation can prove more difficult given contribution eligibility rules. In this animation, we illustrate the work test exemption.

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Household finances: Personal financial statements

Proper, ongoing management accounting is crucial for running a successful, long-term business. This is the same for your personal accounting. In this article, we explore personal financial statements.

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Personal insurances: Insurance premium variables

Insurance premiums can vary considerably from one person to the next due to the diverse range of variables at play. In this article, we explore several of these variables via a case study.

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A minimalist approach to personal finance

Minimalism involves reviewing your priorities and removing excesses that don't add value to your life. In this video, Matt D'Avella shares how minimalism helped him with his personal finances.

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