

In this month's newsletter, we begin with an overview of the recently legislated changes to individual taxation and what these changes may mean for you moving forward. Our animation illustrates personal insurance pre-assessments and the potential benefits associated with completing one. It can sometimes be beneficial to withdraw a portion of your super benefits and then re-contribute it back into super—we explain this strategy further. A home loan will most likely be the largest debt that you pay off in your lifetime—we discuss important considerations regarding this. Lastly, there is a video by Saturday Night Live, where a light-hearted skit is performed on the topic of saving money, and the use of credit for purchases.

Taxation update: Personal Income Tax Plan

In the 2020-21 Federal Budget, proposed changes to individual taxation were announced. In this article, we provide an overview of these now legislated changes and what they may mean for you.

[Read More](#)



Personal insurance pre-assessment animation

A pre-assessment is an informal way of finding out how insurers may view your formal insurance application. In this animation, we illustrate pre-assessments and their associated potential benefits.

[Launch Video](#)



Super re-contribution strategy explained

Super benefits may comprise of two components: a tax-free and taxable (taxed element) component. In this article, we discuss a re-contribution strategy—one way to increase the tax-free component.

[Read More](#)



Key home loan repayment considerations

A home loan will most likely be the largest, and most time/cashflow-consuming, debt you'll pay off in your lifetime. In this article, we provide information on home loan repayment considerations.

[Read More](#)



Financial behaviours and financial wellbeing

Active saving and not borrowing for everyday expenses—these behaviours can positively impact your financial wellbeing. In this video, Saturday Night Live offers a light-hearted skit on this.

[Launch Video](#)



Story Wealth Management Pty Ltd

📍 Suite 1, 191 Riversdale Road, Hawthorn VIC 3122

☎ 03 8560 3188

✉ PO Box 4079 Auburn South LPO VIC 3122

📄 03 8560 0871

@ planner@storywealth.com.au

🌐 storywealth.com.au

Story Wealth Management Pty Ltd ABN 27 091 207 000 is a Corporate Authorised Representative of SWM (Aust) Pty Ltd ABN 79 631 564 853 AFSL 515107 • 1/191 Riversdale Road, Hawthorn VIC 3122 • PO Box 4079, Auburn South LPO VIC 3122