

This month's newsletter begins with helpful tips on reviewing areas of your annual super statement—that you should be receiving shortly. Our animation illustrates the three chapters of retirement—early, middle and late—that retirees will often experience as they progress through their retirement years. For the 2018-19 financial year, the average total tax deduction amount claimed by individuals was \$2,498—we provide an overview of deductions. In 2020, the total reported losses from scams was over \$175 million—we cover different types of scams to be aware of. Lastly, a thought-provoking video by Bloomberg on combatting distractions as a segue to discuss the power of forethought—and the appropriate use of a received (or expected to receive) tax refund this year.

In addition, we would like to share another insightful financial education piece from renowned Australian money educator Vanessa Stoykov—*3 ways to get your partner on board with money plans*.

Tips for reviewing annual super statements

Your retirement income (and outcome) can be intrinsically linked to your accumulation, and use, of wealth inside super. In this article, we provide tips on reviewing your annual super statement.

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The three retirement chapters animation

Retirees will often experience three chapters as they progress through their retirement years: the early, middle, and late chapters. In this animation, we illustrate these three retirement chapters.

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Tax deductions for the financial year ahead

When it comes to deductions, it's vital to know what you can (and can't) claim and the appropriate evidence needed to claim. In this article, we explore deductions for the financial year ahead.

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Staying alert: The different types of scams

In the 2020 calendar year, the total reported losses from scams was over \$175 million (an over \$32 million increase compared to 2019). In this article, we cover some of the different types of scams.

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Tax refunds and the power of forethought

For the 2018-19 financial year, the average individual tax refund was \$2,959. In this Bloomberg video, distractions are covered—a segue to discuss forethought and the appropriate use of tax refunds.

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Vanessa Stoykov: 3 ways to get your partner on board with money plans

Vanessa Stoykov is a renowned Australian money educator. In this special financial education piece, Vanessa discusses several ways you and your partner can get on the same page when it comes to money.

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Disclaimer: the information and any advice provided in this newsletter has been prepared without taking into account your objectives, financial situation or needs. Because of that, you should, before acting on the advice, consider the appropriateness of the advice, having regard to those things.

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