

Why work with a financial adviser?

Because the right advice can be your best investment



IS FOR ALIGNING INVESTMENTS TO YOUR NEEDS

Advisers balance risk and return. They keep you invested in the right mix of assets for your life stage or risk tolerance.

87% of clients agree their adviser has better aligned their investments with their long-term goals.



IS FOR AVOIDING BEHAVIOURAL MISTAKES

Emotions can get in the way when markets swing. Advisers help you stay calm, stick to your strategy and avoid mis-steps.

77% of clients agree their adviser has helped them avoid costly mistakes during periods of market volatility.



IS FOR CHOICES AND TRADE-OFFS

Big life decisions come with trade-offs. Advisers help make them clear, whether its funding education, helping with a house deposit, sorting estate plans and more.

79% of clients agree their adviser has helped them better prioritise between competing financial goals.



IS FOR EMOTIONAL AND TECHNICAL EXPERTISE

Advisers aren't just number crunchers. They're coaches and sounding boards who can help you navigate life's twists with clarity and perspective.

89% of clients agree their financial adviser expertise has given them a clear and structured financial plan.



IS FOR TAX-EFFECTIVE PLANNING AND INVESTING

Tax matters. Advisers optimise strategies across super, investments and more so you can keep more of what you earn.

84% of clients agree their adviser has helped them make more tax-effective financial decisions.

83% of clients feel extremely confident about meeting their long-term financial goals ★★★★★

IMPORTANT INFORMATION

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**Based on Russell Investments Value of an Adviser research 2026, conducted on advised clients residing in Australia.*

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