

Why work with a financial adviser?

Because the right advice can be your best investment



A

1.3% p.a.

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.

B

3.7% p.a.

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 missteps.

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

C

Variable

IS FOR CHOICES AND TRADE-OFFS

Big life decisions come with trade-offs. Advisers help make them clear, whether it's 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.

E

Priceless

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 adviser's expertise has given them a clear and structured financial plan.

= at least 5% p.a. in estimated value

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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