

# Who else could benefit from our services?

What is the preferred way for friends, family and work colleagues to find their financial adviser? Google? Yellow Pages? TV Advertisement? No – it's by a recommendation by a trusted friend. This is why at Delta we seek out other like-minded individuals and business owners like those listed below.

If you know anyone like those below who might benefit from a coffee with Mike Sikar please contact Delta Financial Group on 02 9929 3343 or email us at [mike@deltafinancial.com.au](mailto:mike@deltafinancial.com.au). You can also take comfort from our Referral Policy:

- We welcome the opportunity to meet with any referrals, but there is no pressure placed on them to proceed any further than an initial meeting.
- We maintain strict Confidentiality and Privacy policy procedures and cannot discuss either party's situation or disclose their decisions or objectives.
- We ask for a brief introduction to any client referral, to avoid any surprises - a coffee, via an email or phone call or at one of our seminars.



## “DIY Investors” who might need advice

- Successful executives, managers, professionals
- May have a SMSF fund or are talking about setting one up
- Otherwise already active in the share or property market
- Often “time poor” and need a “helping hand” with their finances
- May have complained about paying “too much” tax
- Might be upset or distressed by market downturn



## Those dealing with a financial issue

- May be undergoing lifestyle changes – career, family, children, death
- Talking about cost to put kids through private schools
- Received a lump-sum payment – inheritance, redundancy, property sale
- Are keen to get into the property market or looking for investment property
- Are unsure about the market and what to do next
- Talks about having to work longer or retire later



## Successful Business Owners

- A small to medium business, including partnerships and family businesses
- Needs advice on utilising spare cash from the business
- Been talking about buying a property within their SMSF
- Are successful but unsure how to keep growing
- Might be upset or distressed by market downturn
- Complain about not being about to take a holiday

*P.S. We are delighted we have been able to help you. Please don't keep us a secret.*