

Private Family Office



for today, for tomorrow



Private Family Office Service Suite

Goodman private wealth advisers understand that successful families with substantial assets need additional services beyond the scope of traditional financial advice. To meet those requirements we offer the Private Family Office.

This service guides successful families towards making the best decisions in managing both their wealth and their complex financial affairs. It also removes the administrative burden and allows the family to focus on what's important to them.

We apply generations of knowledge and experience to create enduring prosperity for our clients.

This introductory guide has been prepared to share an overview of the services you can choose from as a client of the Private Family Office.

For Today, For Tomorrow

Family Compass | private wealth planning

Your personal success matters to us and we take a personal interest in ensuring that Your Private Wealth Plan is a living life plan with measurable milestones – not just a financial plan. We will help you identify the destination and then guide you to choose the best road to get there.

Family Matters | technical, financial & tax strategies

Managing sophisticated financial strategies in an increasingly complex financial environment requires experience, forward thinking and technical expertise. Our depth of experience and understanding of successful families and their situations enables us to deliver the perfect balance of strategy and financial intelligence. Our advice is practical and focused on your needs.

Family Advocates | investment selection & management

We take the time to understand and recommend only those investments that are true to our value based investment philosophy. Your team of trusted professionals focuses on shielding your family's wealth in tough times while delivering superior performance over the long term.

Family Legacy | intergenerational wealth transfer advice

Working closely with you we will develop a tailored plan for the family. A plan that prepares the next generation for the responsibility and stewardship that comes with managing the family's assets.

Family Record | administration, filing & bookkeeping

Your Private Family Office team will take responsibility for the day to day recording of your family financial affairs. Our administrative service will ensure that all records are professionally prepared and systematically maintained. We will maintain the books and files for each of your family's entities and liaise with your accountant for the preparation of financial statements and tax returns.

Family Given | philanthropy

We help successful families understand how they can more easily satisfy their desire to give, while at the same time give in a manner that is both rewarding and provides maximum benefit to the community.

To find out more about our services and how we can help please contact one of our directors – James Goodman, Brad Church or John Goodman on 07 3221 0333.



an initiative of

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