



# Jack & Jill

Jack & Jill are married, in their late 30's and have two children (six and three).

Jack and Jill are exceptionally time poor. They have a home, mortgage, some super and a small amount of savings... Although they earn reasonable incomes and pay their bills on time, both Jack and Jill were concerned that they were not moving forward financially and did not know how to build assets and how they could afford to send their children to private schools.

## Concerns:

- paying for their lifestyle (both now & in the future)
- paying off their mortgage
- funding private school education
- building assets

## Jack & Jill's Story:

Jack and Jill were going nowhere financially, and unsure of what to do... so many distractions seeking their attention and so many conflicting objectives.

Jack and Jill both acknowledged that they should do something. They just didn't know what to do first.

They didn't have the time to undertake the necessary research and due diligence to determine what they should be doing... as this was such a significant undertaking they instead did nothing.

## Outcome:

After seeking our advice, Jack and Jill felt in control of their finances and knew all their financial resources were working as hard as they were.

They had a strategy to repay their mortgage in half the time.

The money they saved in mortgage payments and interest expense assisted them to send their children to private schools (secondary).

The equity available in their home was used to purchase an investment property.

They have sufficient monies to finance their current lifestyle both now and in the future.

This put them on track to being financially self – sufficient.

Ph: 1300 651 564

---

### General Advice Warning

This advice may not be suitable to you because it contains general advice that has not been tailored to your personal circumstances. Please seek personal financial and tax and/or legal advice prior to acting on this information. The Harridge Group Pty Ltd, ABN, is an Authorised Representative of Godfrey Pembroke Limited ABN 23 002 336 254, an Australian Financial Services Licensee, Registered office at 105 –153 Miller St North Sydney NSW 2060 and a member of the National Australia group of companies.