



03 9705 6365



enquiries@ppwi.au



**Suite 404, 65 Victor Crescent,
Narre Warren, Victoria 3805**



Biggs Lane, Warragul Victoria 3820

PPW Investments services clients in South East Victoria with offices located in Narre Warren and Warragul.

We are a boutique firm with a selective clientele to ensure a high level of personalised attention and direct access to our advisers' expertise.

We specialise in Wealth Creation and Portfolio Management with a strong focus on direct investments held through Trusts and Self-Managed Super Funds.

We are flexible and comprehensive, yet not afraid to step in and suggest strategies that may be outside of the brief.

We have highly skilled and experienced advisers who are committed to ongoing education and professional development.

Guidance & Expertise

Securing your financial future with unparalleled advice and personal touch.

You can trust us to take care of your affairs without any surprises. You will feel comfortable working with us and will be confident that our advice is in your best interests. We build close relationships with our clients based on trust and genuine care, guiding people through some of the most important stages of their financial lives. Your adviser will know you by name and you will meet with them regularly, so that you can be sure your affairs are understood and managed by someone who knows you personally.

Our Service

We focus strongly on wealth management.

Our main priority is to maximise returns on investments.

We provide tailored investment strategies by utilising direct investments in preference to managed funds.

Income generation is a priority as this enables lifestyle choices to be made. We take the pain out of managing your finances, helping with both immediate concerns and also planning for the future.

Tailored SOLUTIONS

For Your Financial Needs

- ✓ Wealth Creation
- ✓ Portfolio Management
- ✓ Self Managed Super Funds
- ✓ Trust

Sound Financial Advice IN AN INCREASINGLY COMPLEX ENVIRONMENT



Our Clients

Make decisions with confidence, because they trust the advice they are given.

Our clients are engaged and knowledgeable. They are seeking long-term relationships with professionals that understand them.

Although financially literate, having a trusted adviser who can help avoid emotionally driven decisions in money matters is important to their overall wealth management strategy. They value integrity, responsiveness and a good relationship.

“ Being a part of the PPW Investments family is an integral part of my own families current and future financial comforts. I find them always accessible and never make a move without them”

“ PPW Investments experience, knowledge and expert team were able to build our trust quickly, and have helped us to manage our finances in a positive way by creating a personal financial portfolio based on our goals and wishes. We couldn't be happier with the advice we have received”

“I wanted to say thank you for everything. We really value having you as our trusted adviser. The support, patience and assistance with everything is incredible”