



### OF AUSTRALIANS RECEIVING FINANCIAL ADVICE:



2-IN-5 SAY PROFESSIONAL FINANCIAL ADVICE HAS ALSO BENEFITED THE QUALITY OF THEIR FAMILY LIFE

41%

44% AND MENTAL HEALTH



THEIR OVERALL LIFE SATISFACTION RATING IS

7.3/10

6.4/10 FOR UNADVISED

### VALUE OF ADVICE INDEX



QUALITY OF LIFE

ADVISED SCORE = 68

UNADVISED SCORE = 59

CFP® ADVISED SCORE = 70



FINANCIAL CONFIDENCE

ADVISED SCORE = 62

UNADVISED SCORE = 51

CFP® ADVISED SCORE = 65



FINANCIAL SATISFACTION

ADVISED SCORE = 62

UNADVISED SCORE = 44

CFP® ADVISED SCORE = 65



PERCEIVED VALUE

ADVISED SCORE = 67

UNADVISED SCORE = NA

CFP® ADVISED SCORE = 70

### ADVISED AUSTRALIANS ARE MORE LIKELY THAN NON-ADVISED AUSTRALIANS TO:



FEEL MORE FINANCIALLY SECURE

85% VS 62%

FEEL VERY OR COMPLETELY SATISFIED WITH THEIR CURRENT LEVEL OF WEALTH

35% VS 18%



### TOP 10 KEY BENEFITS RECEIVED FROM A FINANCIAL PLANNER

47% GREATER CONFIDENCE IN HAVING A COMFORTABLE RETIREMENT

37% IMPROVED FINANCIAL DECISION MAKING

40% IMPROVED FINANCIAL WELLBEING

33% IMPROVED MONEY MANAGEMENT

32% IMPROVED GENERAL WELLBEING E.G. PEACE OF MIND, HEALTH AND SOCIAL ASPECTS

### CFP ADVISED HAVE ENHANCED OUTCOMES

86% TANGIBLY FINANCIALLY BETTER OFF

89% PROVIDED MORE VALUE THAN COSTS

95% MEETING MY NEEDS

74% IMPROVED SINCE RECEIVING FINANCIAL ADVICE

92% SATISFIED WITH FINANCIAL PLANNER RELATIONSHIP

30% HELPED YOU ACHIEVE YOUR FINANCIAL GOALS

32% IMPROVED ABILITY TO ACHIEVE DESIRED STANDARD OF LIVING

28% GREATER FINANCIAL CONTROL

28% GREATER WEALTH GROWTH

27% IMPROVED FINANCIAL FREEDOM



### FPA'S TOP TIP ON BEING FINANCIALLY SAVVY

Make an appointment with an FPA member who is a qualified financial planner.

Head to FPA to reach a CFP® professional, or search the **Find a Planner** directory