Wealth Management

ulton

Your partner in wealth and life.

Ulton Wealth is a financial planning business born out of the accounting practice.

Our advisors have a wealth of knowledge and experience acquired over 25 plus years in dealing with business owners, farmers, and professionals with complex structures. We aren't just investment advisors – we bring the expertise needed to understand the interplay between your business, your structures, your family, and your objectives.

Most often, our clients come to us when they:

- Are thinking "I don't know what I want, but it's not this."
- Have spent their life building an empire and don't know how to hand it over to the next generation.
- Are unsure of how to create a legacy for their family.
- Want a partner to discuss their big life decisions with, who will help them see the future through an unclouded lens.
- Want the support of a committed wealth expert, who knows when to listen, when to strategise, and when to take action.

A partnership you can depend on.

Our expert Wealth Management advisors, Kylie Wright and Jes Wilkinson are dedicated to empowering our clients with holistic and comprehensive wealth management advice for life's whole journey.

Uniquely positioned within Ulton and supported by the collective knowledge of our broader team, Kylie and Jes have deep expertise in everything from wealth creation to superannuation to estate matters - making them highly adept at managing complex affairs.

Kylie and Jes go beyond the on-paper details, investing their time and energy to learn about you as an individual, the people you care about, the lifestyle you aspire to and the motivations that drive you. This is how we create a trusted wealth management partnership to serve you for the long haul and beyond. Many of Kylie and Jes's partnerships are intergenerational – a testament to their relationships with clients.

For what matters

Concierge service

Because we understand how busy our clients are with growing their businesses, and farming enterprises, we have developed a Concierge service.

We are the perfect partner due to our role as record keepers for our clients' financial history and our exceptional client service team.

Our Concierge services include:

- Coordinating with your bank or mortgage broker regarding finance.
- Communicating with your general insurance broker.
- Engaging valuers for property assessments and sharing these valuations with relevant parties.
- Collaborating with solicitors to initiate leases or contracts.

The Concierge service is designed to make your financial life easier and more organised.

Our other Wealth Management services:

- Financial advice
- Succession planning
- Investments
- Superannuation and SMSFs
- Retirement planning
- Estate planning
- Insurance advice and claims
- Aged care advice.

As your Wealth Management partner we can help you:

- Take control of your life and finances
- Get absolute clarity on your position
- Set, pursue, and achieve your goals
- Build and protect your wealth
- Achieve financial freedom.

Are you unsure about building off business/off farm assets?

"Many clients come to us because they don't know what's best for their personal situation. That's why we offer a bespoke service that intricately understands your individual situation.

We know there is always a delicate balance in investing further in your business or farming enterprises, versus building off business or off farm assets. You may not know the right questions to ask yourself or like many business owners never find the time to take action.

We make sure that we understand your values and objectives in the wider context of your family and business structures.

We ask the important questions and guide you to the right decisions in this important aspect of financial planning."

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