

# RI Wide Bay



## CLIENT Glenn and Tina

For over 30 years I had been putting a small amount away each week. Yet we weren't sure our nest egg would provide enough for retirement. I couldn't keep up with the changes in financial markets but understood the benefits of a solid investment plan based on my goals and strategies to suit my investment personality.



RI Wide Bay had just set up in town, and being a 'horses for courses' kind of person, I made an appointment. Although we were just everyday workers on a regular wage, with limited savings, Kathy always treated us like royalty. We never felt like we were wasting anyone's time or pushed into investments we couldn't understand or afford.

Even though our business went broke, we were made redundant and the markets fluctuated, regular reviews meant our retirement dreams grew to fruition. We take great pride that we are financially independent and retired earlier than expected.

Photo: Glenn and Tina

"Feeling financially secure at this time of life is worth so much more than just dollars alone. We trusted our advisers and they never let us down. We wouldn't be where we are today without them 'having our back'."

ADVISERS Kathy Paget | RI Wide Bay  
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At RI Wide Bay, we have the expertise, experience and resources to help you get wealth, grow it and keep it safe. We can help you enjoy it because real wealth is about making the most of what you've got whatever stage of life you're in. We know financial advice is as much about lifestyle and relationships, as money – that's why we pride ourselves on long-term, holistic advice, with our clients.

Since we opened in 1996, RetireInvest Wide Bay have become one of Queensland's leading providers of financial advice. We are a team of financial advisers and have an enthusiastic support services team with varied skills and experience to help service our clients at the highest level.