



**COMMITTED TO
PROTECTING, MANAGING &
GROWING WEALTH**



About Us

Nicholls Wealth Solutions is a leading family orientated Financial Planning Practice, with a dedicated team of Financial Services Professionals who are passionate about our fields of expertise. Our aim is to help you get clear on your goals and take an objective look at your finances. We provide straightforward advice based on sensible, tailored strategies so that you can relax and focus on turning your dreams into reality.

With the right direction, our clients have peace of mind knowing they can access professional financial advice and ongoing support to look forward to a confident and secure future. Now more than ever, trying to navigate the increasingly complex tax and super regulations, finding the time to research new investment opportunities and ensuring you meet all the required legal obligations is becoming more and more difficult. That's why getting professional financial advice from a known and trusted source is essential. We help you define your goals, then transform them into a plan that will allow you to realise your dreams.

What we offer

Our areas of advice are broad and whether you are a young professional, a couple with a family, approaching retirement or retired, we can provide tailored advice and move you towards a more secure future.

We can help you with ALL aspect of your finances including and not limited to:

- ✓ Wealth Creation strategies
- ✓ Retirement Planning solutions - Pre and Post
- ✓ Superannuation and Pension advice - including Industry and Defined Benefit funds
- ✓ Centrelink assistance - including how to maximise, applications and ongoing/adhoc updates
- ✓ Personal Risk Insurance
- ✓ Aged Care advice
- ✓ Portfolio Review Services tailored to your specific needs

Naomi Nicholls

Practice Principal and Senior Financial Adviser



Naomi is a wealth creation specialist and passionate Financial Adviser providing quality advice for over 25 years.

Naomi has assisted many clients to help take the stress out of managing money and achieve their goals sooner. She is motivated to help clients at any stage of life to build wealth, plan for & enjoy retirement and achieve their dream lifestyle. She has worked in the financial services industry since 1998 and became a Member (AFP®) of the Financial Planning Association of Australia (FPA) in 1999.

She has attained a Masters Degree in Financial Planning, a Graduate Diploma in Applied Finance, a Graduate Certificate in Applied Finance, Advanced Diploma of Financial Services (Financial Planning) and the Diploma of Financial Services (Financial Planning). She is the Chapter Chair of the FAAA Wide Bay chapter and has held various committee roles for the FPA over the last 15 years.

With these qualifications and experience, she is well-positioned to help clients achieve their wealth and lifestyle objectives, through providing quality holistic advice. Naomi believes that:

'The more that you understand about money, the less you have to think about it. It's about more than just finance, it's about empowering others too'.

Contact Us

No matter what your goals are, now is the time to get started on the path to where you want to be.

Get in touch today.



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