

Dear [First Name],

In this month's newsletter, we begin with a summary of the 'mini-budget' delivered by Treasurer Josh Frydenberg—an economic and fiscal update, detailing the impact of the COVID-19 pandemic, and both the new and existing support provided to individuals, households, and businesses. Our animation illustrates the three-bucket approach to retirement investing—one strategy to help mitigate certain retirement-related risks, and provide for your retirement lifestyle needs and wants. Flexible working arrangements, such as remote working, are becoming more common—we explore the ins and outs of work-related home office expenses. The receipt of your annual super statement can often occur in August—we provide an annual super statement review checklist to help you with staying actively engaged with, and well-informed on, your super. There is also a motivational video by entrepreneur Tom Bilyeu, which may be timely if you have received, or are expecting to receive, a tax refund this year, and are considering how to make the most of it.

Lastly, we might be all working remotely, however, we are just at the end of the line if you need to call us for some reassurance or an update on your personal circumstances. The best way to contact us is below.

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2020 'mini-budget': An economic & fiscal update

The Treasurer delivered a 'mini-budget' on 23 July 2020—an economic and fiscal update. In this article, we provide a summary of the update, inclusive of the main personal finance-related points.

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The three-bucket approach animation

When it comes to mitigating retirement-related risks, and providing for your retirement lifestyle, there can be several strategies employed. In this animation, we illustrate the three-bucket approach.

[Launch Video](#)



Super engaged & well-informed: Annual statements

The receipt and review of your annual super statement can assist you to stay actively engaged with, and well-informed on, your super. In this article, we provide a review checklist to help with this.

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Deductions & work-related home office expenses

According to recent ATO data, for the 2017-18 financial year, 8,950,205 individuals claimed \$2,424 on average in work-related expenses. In this article, we discuss work-related home office expenses.

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Tax refunds: Your vision & investing in yourself

If you have received, or are expecting to receive, a tax refund this year, consider how it can be put to good use. In this motivational video, Tom Bilyeu talks on making your vision a reality.

[Launch Video](#)



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