

With 30 June approaching, this month's newsletter begins with several helpful end of financial year (EOFY) planning considerations for wealth accumulators, pre-retirees and retirees. When it comes to reaching your financial goals, often, either one or more of the different types of asset classes are invested in to do so—our animation illustrates the unique characteristics of each asset class. Financial literacy plays a fundamental role in achieving individual financial wellbeing—we provide a short quiz for you to test your knowledge. Super is widely considered one of the most tax-effective investment structures available—we list 11 key tax facts about super. Lastly, we provide two recent and insightful videos by the Australian Bureau of Statistics (ABS) covering the impact the COVID-19 pandemic has had on individuals, households and businesses.

EOFY planning for the 2020-21 financial year

With 30 June coming up, please consider putting aside time to review your personal finances—and take action, prior to this date, if appropriate. In this article, we provide EOFY planning tips.

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Investing: Asset classes animation

We all tend to invest in either one or more of the different types of asset classes to help achieve our financial goals. In this animation, we illustrate the characteristics of each asset class.

[Launch Video](#)



Financial wellbeing: Financial literacy quiz

When it comes to achieving financial wellbeing, financial literacy plays a key role. In this article, we have put together a quiz to test your knowledge across various areas of your personal finances.

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11 key tax facts about superannuation

From a wealth accumulation and cash flow generation perspective, super is widely considered one of the most tax-effective investment structures. In this article, we cover 11 key tax facts about super.

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COVID-19: Health, wellbeing, lifestyle & finances

In April 2020, 1 in 3 household's finances worsened. This Australian Bureau of Statistics video covers the impact the COVID-19 pandemic has had on our health, wellbeing, lifestyle and finances.

[Launch Video](#)



COVID-19: Jobs, industry & the economy







In April 2020, underemployment hit a historic high of 13.8%. This Australian Bureau of Statistics video covers the impact the COVID-19 pandemic has had on our jobs, industry and the economy.

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Disclaimer: the information and any advice provided in this newsletter has been prepared without taking into account your objectives, financial situation or needs. Because of that, you should, before acting on the advice, consider the appropriateness of the advice, having regard to those things.

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