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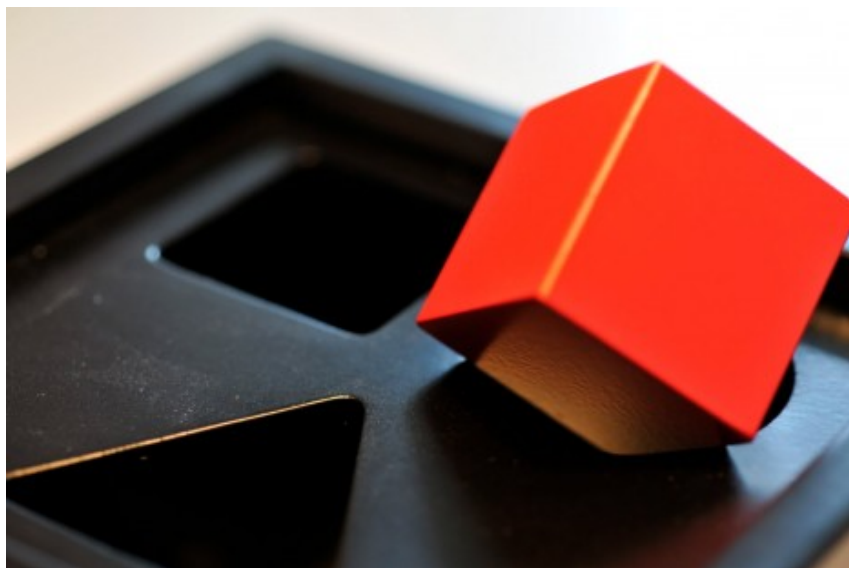
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Alex Lee

Hi, my name is Alex Lee and I'm a wealth planner and welcome to my blog.

Ask me about Tax, Shares, Savings, Super, Property, Life Insurance or

Putting Gen Y and finance together

When it comes to putting financial planning and Gen Y together, it can sometimes feel like you are putting a square peg in a round hole.

The question is why?

I believe there are many reasons for this but the main one is a dis-connect between what the Generation Y population need and their understanding of what a financial planner does. Typically financial advice has been seen for those with large amounts of money to invest and sophisticated affairs when actually it is those who are starting out on their wealth creation journey who need the most help.

An Investment Trends survey of Generation Y's demonstrated that;

- 78 per cent of respondents said they would require advice before buying a home or investment property
- 71 per cent before making a major investment decision
- 60 per cent before borrowing money
- 34 per cent if they lost their job

In our experience in specialising with dealing with gen y's on financial matters we typically get asked the following questions;

- How much do I need to buy a property?
- Where do I buy a property?
- How can I save more? Pay less tax?
- What is super and do I need it?
- How do I get a car lease?
- What is the best credit card?

The above events are large financial decisions that need to be carefully considered with a financial advisor who has experience in those areas as they can have a significant impact on your finances moving forward.

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