

Fresh Horizons and New Confidence for a 55-year-old Divorcee.

Timely financial advice proved invaluable in getting on surer financial footing.

In the beginning

At the time of being referred to us, Heidi (not her real name) was at an emotional low point and in a perilous financial position. Recently single and in her mid-50s, she was exhausted from dealing with a manipulative ex-partner and a complicated, drawn-out divorce. Heidi's settlement also presented significant financial challenges, saddled as she was with various illiquid assets and a low super balance. Asking the wrong people for advice and overreliance on credit cards had further contributed to an uncomfortable situation. Collectively, these factors caused Heidi to feel "under siege", not knowing where the next setback was coming from.

The process

Early days, we ensured that we took matters at a pace that Heidi felt comfortable with. This process entailed a thorough review of her situation and an assessment of her future requirements. To address the significant shortcomings of her portfolio, we instigated the sale of an illiquid asset, using the resulting funds to build up her super balance. Happily, the financial confidence engendered by the positive cash flow we were able to engineer from her other assets enabled Heidi to address very important issues, where she lived and her children's education, whilst gradually rebuilding her life.

We also facilitated access to the right legal professionals for fresh estate planning, an enduring power of attorney and an advanced health directive, all of which were needed to reflect her new circumstances.

The outcomes

The result of our collaboration is evident today. Heidi now has a firm grip on her financial affairs, having readily embraced the set of guidelines we provided. Her nights are no longer filled with financial worries or dwelling on the past. Instead, Heidi lives with the confidence that her goals and needs will be met. She has drawn immense satisfaction from rebuilding her situation and now thoroughly enjoys living on her own terms. She has even referred to us friends who found themselves in similar situations.

In Heidi's own words

"I can't thank the team at Fortitude Private Wealth enough for their incredible support and guidance. Their expertise not only transformed my financial predicament but also provided much-needed emotional support during a difficult time in my life. They went above and beyond to ensure my financial well-being and for that I am truly grateful. Fortitude has given me peace of mind and a sense of empowerment that I thought was out of reach. I wholeheartedly recommend their services to anyone in need of financial expertise and support. "

