

Matthew Kalz



Financial Planner profile

MyLife MyAdvice Financial Planners do not receive commissions or bonuses, so they will always have your best interest at heart. Your first meeting is completely free, and there is no obligation to continue with advice.

Extensive experience

Matt has been employed in the financial services industry for over 45 years, with 29 of those specifically as a Financial Planner.

He has extensive experience in advising clients in regards to superannuation and retirement planning (including Centrelink), and has worked within accounting practices, banking and member service organisations, including time with VicSuper in country Victoria.

Matt commenced working with MyLife MyAdvice as a Financial Planner in July 2012.

Matthew can help you

- understand and meet your lifestyle and financial goals
- understand age pensions and other Centrelink issues
- protect you and your family with personal insurance cover
- maximise your retirement savings with tax effective strategies
- create strategies for saving for your first car, home, or investment property
- manage debt more effectively
- understand aged care
- understand estate planning
- monitor and update your financial plan as required by your changing lifestyle and personal circumstances

Qualified professional

Matt is a member of the Financial Planning Association and his qualifications include:

- Diploma of Financial Planning [Dip FP]
- Accredited Aged Care professional

This profile should be read in conjunction with the MyLife MyAdvice Financial Services Guide.

Specialist product advice

Matthew is authorised to provide you with financial advice in regards to:

- Superannuation
- Managed investments
- Retirement products
- Insurance cover
- Deposit accounts



Matthew Kalz is an Authorised Representative of CSF Pty Limited.

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