Introducing Paul Baggetta

Paul Baggetta

Founder | Principal
Qualified Taxation Accountant & Financial Planner
Business Adviser, Self-Managed Super Fund Adviser
Retirement Planner

Paul Baggetta specialises in helping business owners, professionals and investors in areas of tax, wealth and retirement planning. He is a uniquely qualified and experienced in a number of financial service and advice disciplines:

- Financial planner for over 20 years
- Taxation accountant for over 38 years
- Business owner for over 30 years

Paul can guide and assist you in the following ways:

- Understand what is truly important to you and how you can control your finances to ensure you reach your personal life goals.
- Create a clear and concise financial plan with a step-by-step approach to achieve your personal and financial objectives.
- Educate and empower you to make personal and lifestyle choices and appropriate financial decisions.
- Encourage you to adhere to your goals through a disciplined, proactive and ongoing review process which will help to avoid any potential pitfalls and keep you on track to financial success.

"With many years of experience, I have worked with many clients entangled in complex and multifaceted financial situations. I've been fortunate enough to be able to guide, advise and help my clients with their own unique financial needs. I am committed to continuous learning about successful financial strategies and passionate about finding appropriate financial solutions that ultimately provide my clients with absolute confidence and true peace of mind."

My path to become a Financial Planner started from an early age

I studied accounting after I completed High School, and I always had a keen interest in investment markets and business. In fact, I bought my first investment property when I was 21 years of age and started investing in shares around the same time. In the early 1990's I became involved with a bakery business in a partnership, which I later sold for a substantial profit.

Having finished my studies and gaining work experience at a large accounting firm, my wife and I decided to establish our own taxation and accounting practice. We had the vision of creating a truly integrated, multi-disciplined, financial services business.

So in 1993 I studied and became qualified as a Real Estate Licensee and operated our own successful Real Estate Business. I then decided to round off my financial qualifications by studying and becoming qualified in Financial Planning.

Around 1997, we had the opportunity of selling our real estate business, again for a significant profit. Hence, I have been providing financial planning advice since 1998, and accounting and taxation advice since 1981.

My unique skill set and years of experience in this industry, together with my extensive network of specialist professionals, allows me to provide qualified, valued advice to clients, covering a wide spectrum of financial services all under one roof.

My drive to keep improving

Outside of work I spend a lot of time with my family. It is my favourite place to be and I enjoy every minute with them and our friends. Of course this time spent doesn't always require money, because often it's the simple things that are most appreciated. A quiet barbecue, a family dinner, a glass of wine and a few laughs. But a certain amount of money does afford us a little more time!

I appreciate this precious time and of course realise just how lucky we are to be able to share time together. In fact it's my gratitude that motivates me and keeps me thinking about my business and how to improve. Thinking about my clients and assisting them to meet their financial goals as I have, is what keeps me going.

What lights me up is the knowledge, experience and understanding I can impart to others resulting in positive changes, and in many cases, life-changing transformations. My clients tell me that our advice works. They say they feel in complete control of their finances because we keep them focused and on track to achieving their goals. Our advice means they feel comfortable about their future.

Credentials

You can feel confident engaging me to guide you, to solve your financial planning issues, concerns and needs.

- Business owner since 1989
- Diploma of Financial Planning (Dip FP)
- Diploma of Accounting (Dip Acc)
- Member of SMSF Association (SMSF Professionals Association of Australia)
- Fellow Member of IPA (Institute of Public Accountants)
- Member of NTAA (National Tax & Accountants's Association)
- SuccessionPlus Certifiied Adviser (Business Succession Planning)

Clients say remarkable things about the impact my work has on their financial lives.

"Within the first 15 minutes of meeting Paul, he had addressed all of my concerns. He is thoroughly knowledgeable on his subject, proactive in suggesting alternative options, super quick on his trusty calculator, doesn't waste time talking on tangents and, importantly, Paul doesn't tell you what you should do – he tells you what would likely happen if you were to decide a certain course of action. I spent a further 45 minutes with Paul gleaning many pearls of wisdom and I now feel that I have enough basic knowledge to set a long term plan – something that I hadn't considered before our meeting.

My time with Paul was invaluable and I consider it to be money well-spent as it has saved me many thousands in the long run.

Thanks Paul – I've already started recommending you to other people and I will certainly be back."

Belinda

"Dear Paul and Rosanna, We wanted to thank you both for a most productive session. We came away with more clarity as to what to do with our money and we were very impressed with the service we received. Cheers."

Mr & Mrs Watson

"Our first contact with Paul Baggetta was approximately in March 2007. We are mature aged retirees and having had consultations with four other financial advisors about setting up an SMSF. We decided that Paul Baggetta was the most helpful and offered us good advice. Since then he has administered our Super Fund very efficiently, kept us well informed and has always been readily available for any kind of assistance. We are very confident in his ability to deal with our financial and tax affairs both in and out of our Super Fund. We do not hesitate to recommend Baggetta & Co to any prospective client."

Jill & Lloyd

"Paul's years of experience, wealth of knowledge, integrity and determination to always provide the highest standard of quality work and personalised service has been a blessing to us for the past 20 years. Nothing beats the quality and expertise of Paul's Practice. We wouldn't go anywhere else."

Frank and Carmel

"If you are seeking efficiency, reliability and honesty with your accountant and the added benefits of financial planning. Then, this up to date, progressive and yet personal practice is one I would highly recommend both commercially and personally."

John and Glenda

Further information

To find out how we can help you, please contact us to arrange an appointment.

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