

Meet Mat Bateman, TAG Financial Planner

Mat is a Senior Financial Planner, backed by the team at TAG Wealth.

Mat has 20 years' experience working in the Financial Planning industry. He works extensively through WA regional centres such as Albany, Bunbury and Geraldton.

Mat has a great ability to help clients understand the more sophisticated areas of the financial landscape. He will replace confusing financial jargon with everyday language that is easy to understand.

 Retirement Planning

 Debt Management

 Planning

 Income Protection

 Superannuation

 Insurance & Wealth Protection

 Wealth Foundation & Building

 Wills

Your Financial Pathway. Where do you fit?

Stage 1
 Planning

Planning anything involves a starting point.

Stage 2
 Wealth Foundation

It involves finding ways to save even small sums of money as a platform for the future.

Stage 3
 Wealth Building

Having established a foundation, it's time to start building.

Stage 4
 Retirement Planning

The financial preview should end in a place of comfort and relaxation.

"Way beyond what we expected"



Mat knew how important this was for my wife and I and took a generous amount of time to ensure we had a very good understanding of how our finances were being set up for retirement. Mat made sure we did not feel that any question was not worthy of being asked and made sure we understood everything. We very much look forward to working with Mat during my retirement. Thank you, Edwin



Mat Bateman
ADFS (FP)
Senior Financial Planner

Contact Mat Bateman to get
Financial Planning Advice

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