

Lyle helps Clare plan for a happy retirement

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See how Bridges Financial Planner Lyle Greig helps Clare plan for a happy and rewarding retirement.

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Lyle

My name's Lyle Greig, I'm a certified financial planner from Bridges. I predominantly advise clients on superannuation, investments, redundancy and retirement strategies.

Clare

My name's Clare, Clare Schwartz, and I've recently, well in the last six years, I have retired and I found that in the latter years of work that it was a time when I wanted to

spend more time with my family but felt perhaps I wasn't in a financial position to be able to do so.

I first came to meet Lyle when I was looking at the possibility that I might be able to give up work which I loved but was really become all-consuming and I wanted to look at the idea of spending more time with my children and felt that while ever I kept teaching that it really impacted on what I could do with those choices. And then I had an inheritance quite expectantly and that was when I became more serious about being able to make that

choice. And I was introduced to Lyle and I found somebody here who'd really listen to my individual circumstances and my needs.

Lyle

When Clare originally came to see us we wrote her a plan, gave her a recommendation on her superannuation and the way it should be invested. We also advised her on how to invest the inheritance that she received from that point and she took some long service leave and then retired about a year later so we wrote another plan to commence an income stream and to provide for her retirement. And then maybe I think it was two years later Clare then became eligible for aged pension. So once again, a significant change in circumstances, we need to give her advice and we helped her with all her Centrelink paperwork.

Clare

When I retired, it fortunately coincided with the arrival, shortly after, of my first grandchild. And because my daughter and her family live away on the Central Coast, or in Newcastle, then it did give me that flexibility that I could travel, that I could support her, in a way that would be really helpful. And for my involvement, I mean the joy of the return to me has been extraordinary as well.

I had promised myself, years ago, that in my first year of retirement I would have my trip to Machu Picchu. It just had to be. I think you were a little frightened at times about my itchy feet in travelling.

I think that balance of trying to live wisely within my means has not been a great problem. I think it's the flexibility, where I really value the financial advice, that comes as circumstances change and still, yes, still with my plans of travel.

Lyle

Yes and I really do get a lot of satisfaction out of, listening to clients like Clare who are obviously enjoying their retirement and I've had a small part in that retirement and, sort of, helping her, sort of, achieve those, sort of, travel dreams.

Clare

Having somebody that also realised that, hey, this is my future on the line, to be able to keep, perhaps the lifestyle, my options in travel, being able to support my children

as well to a certain extent where needed. This is really important and I think it was really the confidence, apart from the wisdom of the financial knowledge, the sense of greater peace of mind that came with the way that you were able to explain the situation, so you were also in for the longer haul.

As time went on, and I was offered, well I was asked could I please take a position in a community college, and I picked up that position. It's now three years later, where I'm still teaching at a community college and finding that, through Lyle's advice, that I can keep that parallel.

Lyle

There are options of, you know, not necessarily retiring completely, perhaps going part time or doing some casual work.

Clare

I'd certainly recommend Bridges.

Take the next step

To discuss your financial situation, make an appointment with a Bridges financial planner.

We have an established alliance with Bridges, to provide our customers with financial advice. Bridges has been helping Australians with financial advice for 30 years.

A Bridges financial planner will develop a plan specifically for you; one that's tailored to your needs and circumstances to help you achieve your goals.

To make an appointment with a Bridges financial planner, call 1300 665 553 or email us at info@wecu.com.au. The initial consultation is complimentary and obligation free.

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