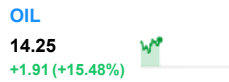
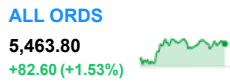


Search for news, symbols or companies Search

Sign in Mail

Finance Home Watchlists My Portfolios Markets Money Work Technology Industries



(e) Australia markets closed

Live Online

Get exclusive access to our new series 'Yahoo Finance Breakfast Cl...
Subscribe to Yahoo Finance's free daily newsletter.



PLAN FOR A FINANCIALLY-SECURE FU

money experts reveal what's at the top of their financial to-do list in 2020

Jessica Yun
Yahoo Finance AU 6 January 2020
Follow



What do financial experts do with their money? (Source: Getty)

Have you ever wondered financial advisers do with their money?

It seems like for them, just like for their clients, 2020 is a new year – and a financial spring clean in order.

- **Related story:** [8 financial experts on the ONE thing you should do with your money in 2020](#)
- **Related story:** [9 things Australian financial advisers wish you knew](#)
- **Related story:** [10 money experts on the bad financial habit you need to quit today](#)

Yahoo Finance reached out to the money experts and eight of them revealed what's at the top of their to-do list in 2020:

Make investing more ethical

For me, it's looking at how I can better introduce ethical and sustainable practices into my portfolio. We do a lot of this with clients and I've learnt so much about this ever changing space over the last few years. I'm a big believer in process and purpose so trying to tie this together with more ethical investment principals is something I want to focus more on in 2020.

–Chris Giaouris, co-founder of Chronos Private Wealth

Quote lookup

Recently Viewed >

Your list is empty.

[Sign in](#)

[Finance Home](#)
[Watchlists](#)
[My Portfolios](#)
[Markets](#)
[Money](#)
[Work](#)
[Technology](#)
[Industries](#)

Get a better deal on my home loan

Review home loan interest rates with a mortgage broker. With the current record low rates there are many institutions willing to offer very competitive rates on their home loans. This has created opportunities to save on home loan interest and I want to see if I can get a better rate from my current lender, or whether I need to break ties and go somewhere else.

–*Cameron McLean, financial adviser, Acumen Wealth Management*

Western Australia Adults Should Know About These Benefits

National Family Ad

Get health to get wealth

Eat my greens!! Health helps wealth. Incorporating mental, physical and lifestyle factors is integral to a successful financial strategy. While none of us can predict how healthy we will be in the future, you can help influence the outcome by making the right lifestyle choices today

–*Tony Sandercock, financial planner, wetalkmoney*

'Record-breaking' plan to protect vulnerable Aussies

Yahoo Finance AU

Hit reset

To take some time away with my husband to reset our goals for the new decade.

–*Adele Martin, founder, Firefly Wealth*

Support local businesses

My personal finance to-do is to ensure that any discretionary spending (food, clothing, personal grooming, gifts, etc.) is spent on Australian grown, produced, designed and/or manufactured goods. It will help me focus more on supporting Australians and our economy.

–*Laura Menschik, director and financial planner, WLM Financial Services*

\$126,000 fines in store for 'dodgy' JobKeeper bosses

Yahoo Finance AU

Shop for a new loan

Personally, I'm looking to start my fourth housing build so will be shopping around for a new construction loan for a home that is bigger than my current 9mx7m former classroom.

–*Amanda Cassar, co-founder, Wealth Planning Partners*

5 places that still sell toilet paper

Yahoo Finance AU

Make your money work with Yahoo Finance's daily newsletter.
Sign up [here](#) and stay on top of the latest money, news and tech news.