PLATINUM
S E R V I C E

Country Financial Directions

Premium contact with your financial planner

The objective of our ongoing service;

Provide appropriate advice
Have your circumstances changed? Building and maintaining wealth is an 'ongoing' journey.

Keep you informed
Are you progressing towards achieving your goals? What advice do you need to stay on track?

Establish a partnership
Working in partnership with you to achieve our agreed goals.

Provide a feeling of comfort
Through education, appropriate advice and partnership, our ongoing advice keeps you on track. We are proactive and continually look at ways of making the most of what you have.

The completion and implementation of your Statement of Advice is just the beginning of our support and guidance. The key to the success of our advice is the ongoing support available with our Platinum service.

This service has a number of components and gives you the opportunity to discuss any changes to your lifestyle and financial needs as and when they happen.

Our Platinum service includes comprehensive half yearly reviews that look at your entire financial position from a strategic perspective. This ensures that you are maximising entitlements and using cash flow in the most productive means available.

Our Platinum service also extends to optimising the performance of your self-managed super fund and keeping you abreast of the strategies available. We also keep you up to date with the relevant changes to legislation that may affect you or your fund.

Our service includes

- Two face-to-face documented reviews of your current portfolio
- Review of goals and objectives
- Two valuation reports provided in conjunction with your half yearly reviews
- Identification of changes to personal circumstances
- Children's education funding requirements
- Review of existing investments and insurance
- Tax planning strategies
- Estate planning strategies
- Centrelink strategies
- Capital protection
- Investment structures
- Cash flow analysis
- Budgeting strategies
- Debt management strategies
- Targets for retirement
- Retirement analysis
- Retirement planning
- Review of objectives to keep on track
- Borrowing to invest strategies
- Self managed super funds

Other services

- Dedicated customer service representative
- Portfolio valuation
- Our regular email newsletter
- Invitation to an annual function
- Special event/legislation change notification
- If appropriate liaise with Centrelink on your behalf
- Liaise with other professionals on your behalf
- Invitations to presentations
- Unlimited phone contact with your financial planner

If we are required to make recommendations that vary significantly from those contained in your previous Statement of Advice in response to a major change in your circumstances (e.g. redundancy, transition to retirement, retirement, inheritance, divorce, Aged Care) we will charge a fee for the preparation of a new financial plan at that time, in addition to your annual service agreement. In this way we keep your annual fees reasonable and only charge additional fees as and when you require additional significant activity.

Contact Us

P 08-9622-1353 | F 08-9622-3848 | Address: rear 55 Fitzgerald Street NORTHAM WA 6401
E info@countryfd.com.au | W www.countryfd.com.au
Country Financial Directions Pty Ltd is a Corporate Authorised Representative of NEO Financial Solutions Pty Ltd
ABN 64 141 607 098, Australian Financial Services Licensee (No 385845)