SILVER
S E R V I C E

Country Financial Directions

An ongoing relationship 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 Silver 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 Silver service includes a yearly review of your current financial position to make sure you are on track to achieve your goals.

Our service includes

- One face-to-face documented review of your current portfolio
- Review of goals and objectives
- One valuation report provided in conjunction with your annual review
- 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
- Review of objectives to keep on track

Other services

- Dedicated customer service representative
- Portfolio valuation
- Our regular email newsletter

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

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