


# Client Service Program

Our annual Client Service Program provides you with direct access to your dedicated Financial Planner and AFS support team. Together we are working to help you achieve the most successful outcome for your financial future.

## Our Client Service Program includes:

- ✓ **Access to Your Advisory Team**  
Reach your Financial Planner and administrative support staff via phone, email or in person - at no additional cost.
- ✓ **Annual Planning Meeting**  
A yearly comprehensive review of your financial position, using live modelling tools to ensure your strategies and objectives remain aligned with your evolving goals.
- ✓ **Tailored Financial Planning**  
Should your circumstances change, a detailed and personalised financial plan can be developed for an additional fee.
- ✓ **Ongoing Education and Updates**  
Receive regular newsletters and investment updates electronically, keeping you informed and engaged with your financial journey.
- ✓ **Invitation to the AFS Annual Client Briefing**  
Attend our annual event (when applicable), featuring insights from the AFS team and guest speakers on current local and international investment issues and opportunities.



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**PROFESSIONAL PRACTICE**  
 **FINANCIAL ADVICE  
ASSOCIATION  
AUSTRALIA**