



## Evolve Program

As a member of the AFS Evolve Program, you will have access to our Client Service Management team at all times via phone or email for everyday queries.

A financial planner will be available to you via email or phone for any advice queries. AFS will send you a Portfolio Review once a year along with an invitation to conduct a Planning meeting over the phone or electronically.

The AFS Evolve Program is designed to offer peace of mind. This basic-level service package is typically for individuals who are starting out in life and need help to make the right choices or are in a stationary stage; like post retirement; that requires very little strategy adjustment. As your circumstances 'evolve', you will have access to the AFS Essential Program that offers a more extensive service.

### The AFS Evolve Program includes:

- ✓ access to administration support staff, whom you can contact by phone or email
- ✓ an electronic Planning Meeting with your financial planner every year to review your financial position and ensure your objectives and strategies are on the right track
- ✓ a tailored financial plan can be provided at an extra fee when or if your circumstances change/evolve
- ✓ electronically delivered newsletters and investment updates



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