



**All Financial**  
SERVICES

# The Essentials Program

As a member of the Essentials Program, you will work with a dedicated financial planner and AFS client service managers will be available to assist you at all times.

AFS will provide a Portfolio Review once a year along with an invitation to meet with your planner.

This consolidated service package is suitable if you are in an established financial situation without fluctuating demands or have limited financial planning needs, but appreciate the agility of utilising the expertise of a planner to ensure the safety of your future. As your circumstances develop, you will have access to the AFS Private Client Program which offers a more comprehensive solution.

## The AFS Essentials Program includes:

- ✓ access to a financial planner and administration support staff, whom you can contact by phone, email or in person at no extra cost
- ✓ an Annual Planning Meeting to review your total financial position, and ensure your objectives and strategies are aligned using live modelling tools
- ✓ a comprehensive, tailored financial plan can be provided at an extra fee when or if your circumstances change/evolve
- ✓ electronically delivered newsletters and investment updates
- ✓ an invitation to the AFS Annual Client Briefing, where the AFS team and guest speakers discuss current local and international investment issues and opportunities

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FINANCIAL PLANNING ASSOCIATION of AUSTRALIA