Financial Advice Process

Getting to know you

We will meet to discuss your goals, objectives and needs. Our conversation will include what you are wanting to achieve, as well as the services All Financial Services can provide.

What do you need to do?

You will need to answer various questions to help us complete an initial fact find document. This document will help us to understand your needs, and tell us more about you. If you can't answer some of the questions, we'll be able to help you through it.

Research

Using the information you provided, we will fully research your situation. We will then investigate different strategies and product solutions that will help you to achieve your goals and meet your objectives.

What do you need to do?

While we conduct our research and investigations, you will have time to reflect on our initial conversation and raise any additional thoughts you may have. We may ask you for further information as the process evolves.

Plan preparation

Based on the research,we will prepare a comprehensive financial plan, known as a Statement of Advice, that will outline the strategies we recommend for you.

What do you need to do?

You won't need to do anything during this time. We will be in contact with you when the plan is complete.

Sharing with you

We will meet with you and provide you with the completed financial plan. We will explain our recommendations, take you through why these have been chosen and give you time to consider the advice.

What do you need to do?

Read through the Statement of Advice, making sure you understand the recommended strategies and the costs associated with our advice.

Take the time to understand the financial plan and ask us any questions you may have.

Execution

If you agree with our recommendations, we will implement the strategies and any product solutions. We will not implement our advice unless authorised by you.

What do you need to do?

If you agree to the recommendations, we will provide you with application forms for you to sign. These forms help us to implement the strategy and product recommendations.

Staying in contact

It is important to review the advice we provided, your circumstances and your goals, to ensure you stay on track. Your Annual Advice Agreement will outline when we will meet again to review your financial situation and goals.

What do you need to do?

We will contact you when your Annual Planning Meeting is due, but you don't need to wait until your review date to be in contact with us. Let us know at any time if your situation or circumstances change.

Suite 4, Ground Floor NAB House, 71 Smith Street, Darwin NT 0800 • GPO Box 2478, Darwin NT 0801
Tel 08 8980 9300 Email info@afsnt.com.au www.afsnt.com.au

All Financial SERVICES