Private Client Program

As a Private Client, you will receive pro-active, comprehensive service from a dedicated financial planner.

Your financial planner and the AFS team will put you in control of your financial future and help you achieve your lifestyle goals.

AFS Private Client Program is designed to offer high priority personalised service that is committed to assessing the appropriateness of your financial plan. By consistently ‘stress testing’ your working strategy in a live environment, suitable adjustments can be employed to ensure the best outcomes for your future.

The Private Client Service includes:

- a highly experienced financial adviser will guide you through the maze of financial options and be available to you to help you stay on track
- access to administration support staff, whom you can contact any time by phone, email or in person at no extra cost
- an Annual Planning Meeting to assess your total financial position and ensures your objectives and strategy are aligned using live modelling tools
- a comprehensive, tailored financial plan at no extra cost when required as your situation changes/evolves
- the offer of a half-yearly portfolio review if required
- 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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PROFESSIONAL PRACTICE
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