

Your Best Interests

The duty contained in section 961 of the Corporations Act 2001 (Cth) requires advisors to act in the best interests of their retail clients and to place their clients' interests ahead of their own when developing and providing personal advice.

We embrace the concept of the best interests duty and give priority to your interests ahead of our own. Our commitment is to act in the best interests of you, our client, and to act honestly, professionally, fairly and objectively in the provision of financial services. The processes we follow demonstrate the priority we give to your interests ahead of our own.

Your Statement of Advice ("SOA") document also forms part of the process of meeting our obligations under the best interests duty. So that we can provide you with appropriate advice that meets your best interests, it is important you provide us with critical and timely information about your actual circumstances. You are requested to keep us updated on any changes to ensure the advice provided and products we have recommended remain relevant to your personal circumstances. You have the right not to divulge any information should you not wish to do so. In that case there may be limitations on the advice which can be provided in this SoA. You should read the information in this SoA thoroughly before making any decisions relating to the advice, product(s) or services recommended within it.

Our aim is to ensure that you are provided with quality advice tailored to your specific requirements.

Your SoA contains information about the advice and clearly articulates the recommended financial planning strategies and product recommendations including relevant information and disclosures. acting upon it.