



Community Financial Services working with you



Service Offer

Our Commitment to you

To provide ongoing service to ensure your unique financial goals, Debt Management and investments are aligned to help you shape your tomorrow.

By embracing our ongoing financial advice today you may feel better about your tomorrow

- ✓ Create a foundation to protect and build wealth.
- ✓ Answer your questions about important life events and money.
- ✓ Make money decisions simpler by understanding the outcomes.
- ✓ Accelerate your path to increased wealth.
- ✓ Take control of your financial affairs with confidence.

Financial Planning Platform Fundamentals

- Providing you and your family immediate protection if retirement is premature in the event of Death or Disability.
- Include Debt management. Consolidation and efficiency within your Financial planning Platform.
- Insure your investment options are appropriate for you, including the choice of managers and allocation of asset class. You may even choose to manage investments yourself.
- The platform should allow you to access potential entitlements to government assistance, and taxation retirement strategies.
- Should allow your employer to contribute SG contributions to your retirement account and also accommodate any contributions you wish to make yourself.

Your Financial Planning Platform apart from your home is the most important and valuable asset you will ever own.

Looked after properly, it will allow you to maximise your saving and help you achieve your goals.



At Community Financial Services we believe your valuable time is best spent in you doing what you do best.

And at the same time allow us to focus on what we do best.

Our goal will be to provide you with peace of mind, in the knowledge that your platform is efficient, is working for you in a safe and dynamic investment environment, and is providing financial protection for you and your family.

- **MONITOR**

We will monitor and stay tuned to developments and trends within your investments and Superannuation environments.

- **REVIEW**

We will undertake to discuss with you, on at least a yearly basis, your account balance and performance. You will also have the opportunity to discuss investment strategy and allocation.

We will also discuss with you any changes to your current circumstances, including; your employment status, ongoing family relationships, acquisitions, and any other changes which may affect your strategies and goals.

- **COMMUNICATE**

You will be issued with ongoing newsletters, budget updates, and other announcements, keeping you informed.

- **ACCESS**

Allow you access, at any time of the year, to myself and our dedicated customer support team, on standby to help and assist you throughout the year with any matters in relation to financial services.



A fresh approach
to how we
support you.

We're here when you need us

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