



Complaints Management Policy

Planning Partners Pty Ltd is committed to the efficient resolution of complaints received in relation to the services that are offered by our organisation, and its representatives and staff. We understand that complaints can be a valuable source of information and can assist us to improve the way we deal with our clients.

It is important that any complaints received are handled in the correct manner to build client confidence in us as a financial advice provider.

Should you not be happy with our services, please tell us. We can be contacted as follows:

Phone 03 9830 0366

Online planningpartners.com.au

Email advice@planningpartners.com.au

Mail Ground Floor, 971 Burke Road, Camberwell VIC 3124

Should you need assistance in lodging a complaint with us, we will provide you with options available (e.g. interpreter services if English is not your first language, etc).

We will acknowledge receipt of your complaint within 1 working day. We will then investigate the complaint and respond to you within 30 calendar days. Some complex matters may require an extension to thoroughly investigate the complaint and bring it to resolution. We will notify you if this is applicable.

If you are not fully satisfied with our response, you have the right to lodge a complaint with the Australian Financial Complaints Authority (AFCA). AFCA provides fair and independent financial services complaint resolution that is free to consumers.

Phone 1800 931 678 (free call)

Online www.afca.org.au

Email info@afca.org.au

Mail GPO Box 3, Melbourne VIC 3001