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Dear Valued client,

Advice Process Change

As a valued client of this Practice we are contacting you to inform you of a change in the process we use to deliver and document our advice to you which should enhance the service we offer.

In the normal process of delivering advice, we document our recommendations in a Statement of Advice (SoA). This document confirms that the advice was provided by an individual adviser, who is authorised through Millennium3 Financial Services.

The adviser to date has provided the advice and resulting SOA to you on behalf of our Practice, On Par Financial Planning. The SoA will now be provided by the Practice, which is a Corporate Authorised Representative of Millennium3 Financial Services. We have attached our Financial Services Guide (FSG) which has been updated to reflect this process change.

What this means for you

The main benefit to you of the change is the ability for other advisers within the Practice to provide advice and support to you in relation to your original advice, should your adviser be unavailable. For example, when your adviser takes annual leave or is away sick, or when the Practice requires the flexibility to have other advisers manage your account.

As the providing entity is now the Practice, as opposed to the individual adviser, we will be able to involve additional resources within the business to better manage your account during planned or unplanned absences of the adviser.

No change to your relationship

This will have no other impact on your relationship with us, other than allowing us to provide a more efficient service.

If you'd like to discuss this initiative with us, please don't hesitate to call our office on (07) 3368 9098.

Yours faithfully,

David Pamenter
Practice Principal
On Par Financial Planning