

Matrix Planning Solutions Limited

AFSL No. 238256

ABN 45 087 470 200



GPA Matrix Specialises in Retirement & Investment Planning Wealth Creation – Risk Protection - Estate Planning

Client Rights and Service Pledge

- A thorough Need Analysis of your financial affairs.
- A written report signed by the adviser, including details of all investment charges and/or fees.
- The best possible strategy or service to suit your circumstances and to act in your interest.
- A minimum annual review to ensure that your plan meets its objectives and takes into account recent personal and corporate changes, inflation and legislative changes.
- GPA to respond to messages within 24 to 48 hours.
- Duty of care and due diligence - To exercise due care and diligence when analysing problems and offering solutions.
- Confidentiality - To treat your personal and/or business affairs in the strictest confidence. All GPA Matrix Advisers and Staff have signed extensive confidentiality agreements.
- To assist with claims and payments at no additional cost.
- To attend to changes of address, changes of beneficiary and minor plan changes at no extra cost.

Note: Requests for extra reviews, policy details from solicitors and specialised requests may result in fees being charged. Any such fees would be communicated to you in advance.

GPA Matrix
PO Box 820
NEWCASTLE NSW 2300

T 02 4926 2022
F 02 4926 4789
E admin@gpamatrix.com.au