



Own your tomorrow...

...through establishing an ongoing service partnership.

Confidently be on track to meet your financial goals.

You're already on the way to owning your tomorrow with specific advice about your finances in place.

From time to time, your personal circumstances will change. You may find yourself re-thinking your goals.

You may find that you want easy-to-understand advice on how to manage your financial assets to create more financial assurance for you and the people you care for.

An ongoing service package ensures a review of your financial situation to make sure you're still on track to meet your financial goals.

Darwin Financial Services will implement your ongoing service package, helping you make tomorrow the future you've always wanted.

DISCOVERY Service...

Monitoring economic, legislative or circumstantial changes is what is needed after the consolidation of your investment portfolio. We will work together through the review process applying any modifications to your portfolio to ensure you stay on track to achieve your goals. The DISCOVERY package is designed to give you a 12 month comprehensive review and make any changes on a fixed fee arrangement.

Plan today.

Darwin Financial Services

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Accredited by
AMP Financial Planning | AMP 

Financial Advice

What to expect?

We will:

- Review your current financial situation and objectives to see if you are on track
- Answer your questions about important life events and money
- Provide further financial advice to meet your goals
- Discuss fees up-front for any additional advice with ongoing services.

Discovery Service includes:

- Annual review call
- Annual review appointment at your convenience
- Risk adversity analysis
- Direct access to planner - advice queries
- Access to planner support staff throughout the year for any administrative queries
- Management of your portfolio
- 24 hour, 7 day a week visibility to your portfolio and its performance via AMP MyPortfolio online
- Access to any associated services provided via Darwin Financial Services i.e. Mortgages

Own tomorrow...
Plan today.