



FINANCIAL FOOTPRINT

Fitzpatricks Private Wealth Pty Ltd Australian Financial Services Licensee No. 247429

Service Portfolio Review

Step 1 Discovery

This initial offering will provide you with a comprehensive summary of any existing policies you have in place, including up to date balances, summaries of any fees and charges associated with the policies and an explanation of the investments, superannuation or insurance policies.

Adviser Profile

At Financial Footprint the focus is on providing quality 'holistic' advice to clients with an emphasis on developing long-term relationships.

As a CERTIFIED FINANCIAL PLANNER® and member of the Financial Planning Association of Australia, your adviser has an extensive knowledge of the key drivers required to ensure clients have as much success as possible in achieving their goals and objectives.

"Good advice pays for itself... With the benefits of obtaining the right advice, you can create efficiencies and opportunities that may otherwise remain undiscovered..."

Client Acknowledgement

I acknowledge that a cost of \$495 will be associated with this service and that I will be invoiced directly from Financial Footprint.

Client name/s: _____

Client Signature/s: _____

Dated: _____

**additional charges may apply for more than 2 policies*

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