CFL Financial Planning

CHOICES | FREEDOM | LIFESTYLE

Our **New and Improved** Advice document process.

STEP 1

Update your information in our Secure CFL Client Portal

Around your review time, you will receive an email from us to update your information in our Secure CFL Client Portal. This email includes instructions to register and update your details securely. Once completed, this information is made available to your adviser.

STEP 2

CFL will prepare your Advice document

Your adviser will view the changes you have provided and begin preparing recommendations based on your current circumstances, and in line with your goals and current economic circumstances.

STEP 3

Present your Advice document

Once your Advice document has been completed, we will notify you and securely deliver it to you.

STEP 4

Return signed documents

Once you have read through your Advice document, and are happy to proceed with the recommendations made by your adviser, we will implement the agreed changes upon receipt of the signed documents.

For more information, visit: www.CFLFinancial.com.au