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A Message From...

Advice First are one of Australia's leading Financial Planning firms, with a team of specialist advisers dedicated to ensuring ~~our clients~~ achieve peace of mind through education and ~~sound~~ advice. We look forward to helping you make the right choice for your superannuation fund!



David Treacher
Certified Financial Planner

David has 25 years experience in the financial planning industry, and is

regarded as a specialist in the corporate superannuation field. He is one of five specialist planners in the firm, and is responsible for the education and advice process available to members of our superannuation funds.



Kim Lacey
Member Services

Kim is our frontline contact for member enquiries and administrative issues. She is committed to

providing friendly and efficient service to all our members, meaning all your queries will be attended to personally, and you won't have to deal with long phone queues or an automated process whenever you call!



Diann Davidson
Education Manager

Diann has 16 years experience in the financial planning industry, the last 13 specialising in

corporate superannuation. She will be the reference point for Management and Policy Committees, as well as providing education seminars and workshops to fund members.

The services of **Advice First** are available to all members of your company superannuation plan, which has been selected as the ~~default fund for permanent and full time staff~~ primarily because it offers:

- ✓ A wide range of investment choice
- ✓ Competitive fee structure
- ✓ Low cost insurance benefits, including death, total permanent disablement (TPD) and (if selected) income protection
- ✓ The provision of education and personal advice

Please read the attached statement for more information on your plan features and benefits.

Call us to: Replace all below

1. ~~Rollover a previous super~~
2. ~~Make additional contributions~~
3. ~~Personalise your investment strategy~~
4. ~~Increase your Death and TPD cover~~
5. ~~Nominate a Beneficiary~~
6. ~~Obtain account information online~~
7. ~~Open a Spouse Account~~

Advice ✓
FIRST

Please call **Advice First** on **1800 243 222** if you have queries regarding your superannuation choice, or would like any assistance.

1.

replace with You

2.

Replace with Dennis Perry

3.

5.

6.

Use Advice First Tick Box