

Your 7 Step Guide To Booking Your Appointment Online

Step 1 – Select A Service

Choose the option that best suits your needs:

Annual Progress Review Appointment

For existing clients with an Ongoing Service Agreement who have received a reminder for their annual progress review.

Introductory Consultation (excluding Aged Care & Age Pension matters)

For New Clients

For new clients (excluding those seeking Aged Care or Age Pension advice) wishing to schedule their 1st appointment.

Financial Plan Presentation & Document Signing

For clients who have been notified that their financial plan (Statement of Advice) is ready to review.

Other (Aged Care, Age Pension, Deceased Estate, Ad-hoc Review, Follow-Up, etc.)

For clients seeking assistance with Aged Care, Age Pension, superannuation death benefit claims, or any additional/ad-hoc reviews outside of an annual progress review.

HEADING FORWARD
FINANCIAL PLANNING

Heading Forward Financial Planning

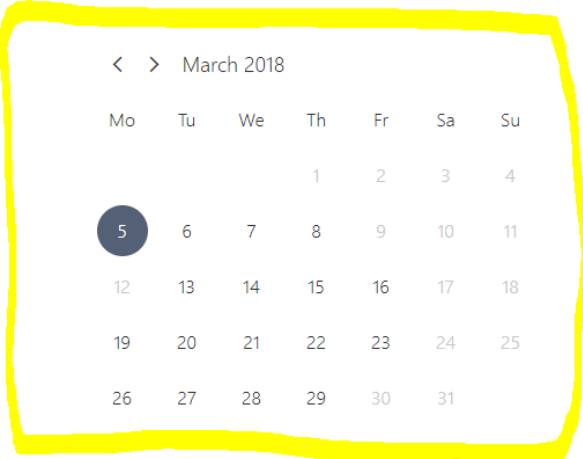
Select service

Introductory Consultation (excluding ... 2 hours \$ 175	i	Annual Progress Review Appointmen... 1 hour 30 minutes	i
Financial Plan Presentation & Docum... 2 hours	i	Other (eg. Aged Care, Age Pension, D... 2 hours Price varies	i

Step 2 – Select A Date

Click on your preferred appointment date. (If no times are available, try selecting another date or checking the following month.)

05 March



Mo	Tu	We	Th	Fr	Sa	Su
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

9:30 am 10:00 am 10:30 am
11:00 am 11:30 am 12:00 pm
12:30 pm 1:00 pm

© All times are in (UTC+09:30) Adelaide

Step 3 – Select A Time

Choose a time that works for you from the available options.

05 March

< > March 2018

Mo	Tu	We	Th	Fr	Sa	Su
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

9:30 am	10:00 am	10:30 am
11:00 am	11:30 am	12:00 pm
12:30 pm	1:00 pm	

ⓘ All times are in (UTC+09:30) Adelaide

Step 4 – Enter Your Details

Fill in your name and contact information.

Add your details

Name

Email

Phone number (optional)

Address (optional)

Please let us know if you have any special requests.
Thank you.

Notes (optional)





By clicking below you agree to the seller's [terms and conditions](#) and [privacy policies](#).

Book

Step 5 – Provide Additional Information

✓ *New Client Introductory Consultation:* Click the “i” icon and read who this meeting is best suited to, then confirm via the dropdown box.

Select service

Introductory Consultation (excluding ... 2 hours \$ 175		Annual Progress Review Appointmen... 1 hour 30 minutes	
Financial Plan Presentation & Docum... 2 hours		Other (eg. Aged Care, Age Pension, D... 2 hours Price varies	

Provide additional information

I've clicked on the information icon above and read who this type of appointment is best suited to and confirm:

--select an option--

✓ *Other Appointments:* Select the primary reason for your appointment from the dropdown menu.




Provide additional information

The primary reason for this appointment is:

--select an option--

Step 6 – Choose Your Preferred Meeting Format

Select from:

-  Face-to-Face Office Appointment
-  Microsoft Teams Video Call
-  Telephone Call

Provide additional information

Please select your preferred appointment format

--select an option--

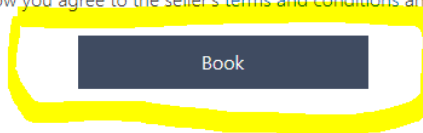
Step 7 – Complete Your Booking


Click **“Book”** – and you're all set! You'll receive a confirmation email shortly and a reminder the day before your appointment.

Add your details

Name	Please let us know if you have any special requests. Thank you.
Email	
Phone number (optional)	
Address (optional)	
	Notes (optional)

By clicking below you agree to the seller's terms and conditions and privacy policies.



 *Prefer to book over the phone? Call us on 8294 3515, and we'll be happy to assist! 😊*