Merlin Money
Book your free virtual meeting today
www.merlinmoney.com.au
contact@merlinmoney.net
Tel: 02 8035 7650

Quality Financial Advice for all Australians

Our Service Program

There's no greater reward than seeing our clients achieve their goals – that's why being part of our Service Program is such an exceptional opportunity to ensuring you secure the financial future you imagine.

We understand your financial needs are always changing. Whether it's your personal circumstances, the external market or government legislation, with our Service Program you can be truly confident that your advice needs are always taken care of, in a way that suits you.

Our Service Program gives you access to our expertise so we can:

Support you with choice – your advice, your way

We understand the need for personalised, tailored advice and we focus on ensuring your individual advice needs are met in a manner that suits your uniquely personal circumstances. Whether you want to consult with us just once a year, or chat with us more frequently, it's up to you.

Provide discipline & accountability via a true partnership

We know that having a true partner; someone you can rely on and who knows what's happening in your life and where you want it to go is important to keeping you accountable to the long term plans that will see you achieve your goals.

Make it easy to connect with us

Your individual needs and preferences come first which is why we provide our clients the flexibility to stay updated on their progress in a way that suits them – whether it is via phone, email or online, you'll always have easy access to our team and expertise.

Keep you on track

The world we live in changes all the time, so our role is to keep you on track to achieve your lifestyle goals by:

- Monitoring your progress through regular communication & reviews
- Keeping you informed of external changes like legislation or investment markets that may impact your financial plan
- Educating you on new opportunities that may get you to your goals sooner
- Adjusting your financial plan if your finances, family, career or goals have changed

Always put you first

We're proud of the services we offer our clients to help them make the right financial decisions, which is why we:

- Openly disclose our fees – nothing is hidden
- Send you a written statement each year detailing the services you've received from us and how much you've been charged
- Proactively check in to ensure you feel you're getting value and adjust our services as needed.

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Merlin Money Service Program

Not only are your personal and financial circumstances always evolving, but so are government legislation and market conditions, so it's critical to review your financial plan regularly.

At Merlin Money, we believe in financial advice that meets you where you're at.

We understand people have different circumstances and needs, that's why we tailor our programs to suit you no matter where you are in your wealth journey.

Option 1: Engage Do it yourself	**Option 2: Support** We'll support you	**Option 3: Premium** We'll do it for you
I'm comfortable managing my own finances & making my own decisions.	**I like to do my own research but want instant access to premium knowledge, expertise and guidance to help me make the right decision.**	**I want a specialist to be in charge of my finances, keep me on track and tell me what strategies are best to secure my financial future.**
• Ongoing communication • We'll keep you informed so you can stay on top of what's happening in the always evolving financial world.	• Direct access to your financial advice team • We are available to discuss any concerns and answer your questions throughout the year.	• Direct access to your financial advice team • We are available to discuss any concerns and answer your questions throughout the year.
• Help and guidance over the phone • Unlimited contact with Merlin Money's phone-based advice team for help and guidance when you have questions.	• Progress review with your Merlin Adviser • A comprehensive review of your current situation to ensure you stay on track & to manage any critical personal or external changes which may impact your financial plan.	• Progress review with your Financial Adviser • A comprehensive review of your current situation to ensure you stay on track & to manage any critical personal or external changes which may impact your financial plan.
	• Access the latest expert opinions • Direct e-access to the latest expert opinions, dynamic and timely webinars including economic predictions, interviews with leading industry experts and comprehensive Federal Budget reports.	• Access the latest expert opinions • Direct e-access to the latest expert opinions, dynamic and timely webinars including economic predictions, interviews with leading industry experts and comprehensive Federal Budget reports.
	• Tailored tips and strategies • We'll let you know about relevant new financial strategies that you can take advantage of.	• Tailored tips and strategies • We'll let you know about relevant new financial strategies that you can take advantage of & send you exclusive event opportunities as they arise.
	• Merlin e-Newsletter • A regular e-newsletter sent directly to your inbox, packed full of expert opinions, tips and feature articles	• Merlin e-Newsletter • A regular e-newsletter sent directly to your inbox, packed full of expert opinions, tips and feature articles
		• Portfolio Update • Our team will prepare and send you a detailed review of your portfolio of investments and contact you to discuss any changes.

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