

Company: Corp-Plan Wealth Management Pty Ltd

ACN: 607 116 414

AFSL: 479 803

Date Updated: 24/09/21

Corp-Plan Wealth Management Pty Ltd

VERSION CONTROL

Version Number: 1

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Notes: Original document prepared and finalised.

1. INTRODUCTION

1. Corp-Plan Wealth Management Pty Ltd is committed to effective and efficient complaints management and to fair and transparent dealings in the financial marketplace
2. A complaint is an expression of dissatisfaction made to or about an organisation, related to its products, services, staff or the handling of a complaint, where a response or resolution is explicitly or implicitly expected or legally required.

2. OUR COMPLAINTS MANAGEMENT PROCESS

1. We take your feedback seriously and will work proactively to investigate and resolve your complaint. If you have a complaint, please contact us by any of the following methods:
 - (a) Email (not posted online) or via the Contact Form on this website;
 - (b) Telephone: 07 55740 501;
 - (c) Post: PO Box 7226, GCMC QLD 9726;
2. Any material relating to Corp-Plan Wealth Management Pty Ltd's Internal Dispute Resolution ("IDR") process will be provided to you free of charge.
3. We will collect certain information from you, including:
 - (a) Your name;
 - (b) Your contact details;
 - (c) How you would prefer to be contacted;
 - (d) A description of your complaint; and
 - (e) How you would like the complaint resolved.
4. We will acknowledge your complaint, generally within one (1) business day, and give you the contact details of the person responsible for dealing with your complaint.
5. The person responsible for dealing with your complaint will commence their investigation and may require further details from you. Upon completion of their investigation, the person responsible for dealing with your complaint will contact you with an IDR response. This will provide you with information about:
 - (a) the final outcome of your complaint at IDR; and

