

Complaints handling policy



Provided by

Wealthier Pty Ltd ABN 66 632 448 947

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(together **we, us, our**)

As authorised representatives of Wealthier Advice Assurance Pty Ltd

ABN 92 663 398 365 AFSL No. 544785 (Licensee) Date 15 May 2023

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Version 15 May 2023

How to make a complaint

We want to give our clients the best experience, so if you're unsatisfied in any way we'd like you to tell us about it.

We'll take your feedback seriously and aim to resolve your complaint in a respectful, fair and reasonable way as quickly as we can. We ask that you treat us with respect also and provide us with reasonable assistance during the process.

Our complaints process

- 1 Collect any documents or records that relate to your complaint, including information on any relevant times, dates and names that could assist our investigation.
- 2 Get in touch with us and tell us about your complaint, including what happened and how you think it could be fairly resolved. You may need to provide us with some personal information, including your name and contact details which we will collect in accordance with our privacy policy which can be found at wealthyer.com.au/privacypolicy

The best way to contact us is by telephone at **0411 149 044** or email at simon@wealthyer.com.au

You can also make an anonymous complaint, but it will likely make it more difficult for us to investigate and resolve your complaint. If you prefer, you can authorise someone else to talk to us on your behalf, for example, a friend or family member, a legal representative or financial counsellor.

- 3 We will acknowledge your complaint and try to resolve it as quickly as possible, if not straight away.

How long will the process take?

We aim to resolve all complaints as quickly as possible. If we can't give you an answer immediately, we'll aim to get back to you within 5 business days.

Some complaints require more investigation. If this happens with your complaint, we'll give you a written response within 30 days of receiving your complaint. We'll also keep you informed of our progress.

If we can't resolve your complaint within 30 days, we'll get in touch to explain why and let you know how to contact the Australian Financial Complaints Authority (AFCA).

What happens if you're not happy with our response?

We provide financial services under the licence held by Wealthyer Advice Assurance Pty Ltd ABN 92 663 398 365 AFSL No. 544785. As a financial services business, Wealthyer Advice Assurance is required to be a member of AFCA, which provides free external dispute resolution services to consumers. If you're not happy with our response, you can refer your complaint to AFCA.

ACFA address

Australian Financial
Complaints Authority
GPO Box 3, Melbourne
Victoria 3001

AFCA contact details

Phone 1800 931 678
Fax 03 9613 6399
Website afca.org.au
Email info@afca.org.au

If your complaint is about privacy, you should contact The Office of the Australian Information Commissioner.

OAIC address

Office of the
Australian Information
Commissioner
GPO Box 5218, Sydney
New South Wales 2001

OAIC contact details

Phone 1300 363 992
Fax 02 6123 5145
Website oaic.gov.au

