



10 October 2018

FGB Financial Strategies
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This letter has been written with much thought and mixed emotions. After spending close to 30 years in the Financial Planning industry I have decided to retire.

During the last two months, we have been conducting sale negotiations of our practice with Adelaide Financial Planning business Poynter Hargraves Financial Consultants Pty Ltd (Poynter Hargraves). It has been a difficult time but I feel very comfortable with our decision, knowing you will receive excellent service and be well looked after by the Poynter Hargraves Team going forward.

As of the 31 October 2018 Poynter Hargraves will be appointed as your new Licensee and be responsible for providing you with financial services and financial product advice. This means that as of this date Fortnum Private Wealth Ltd as Licensee will no longer be responsible for providing you with financial services and financial product advice.

What will stay the same?

- Financial Advisor Dale Martens will become an Advisor at Poynter Hargraves
- Candice Semmens and Michelle Jamieson will move in to the Poynter Hargraves team and provide ongoing support in your transition

What will be available to you?

- You will be invited to receive regular progress update meetings with an experienced Advisor
- A central office location with ample off-street and on-street parking. Poynter Hargraves offices are located at Level 1, 215 Greenhill Road, Eastwood
- Transparent communication about your products, services and fees
- Access to a dedicated Client Services Team

Should you not wish to transfer to Poynter Hargraves and wish to remain under the Fortnum Private Wealth licence, please contact us before the 31 October 2018. In the event that we do not hear from you by this date, we will assume that you wish to move to Poynter Hargraves.

I would like to take this opportunity to thank you for your ongoing support over the years and wish you the very best in your future endeavours.

Should you have any questions in relation to this please feel welcome to call our office on (08) 8211 6611.

Yours sincerely,

Andy Murdock
Managing Director
FGB Financial Strategies