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Dear Client

In recent months we have been conducting merger negotiations and I am now thrilled to announce that as of 20<sup>th</sup> June 2019 ACF Planning Pty Ltd will merge with financial services company, Poynter Hargraves Financial Consultants Pty Ltd.

Many of you would not have heard the name Poynter Hargraves Financial Consultants Pty Ltd, however the organisation has been in operation for over 32 years. Beginning in 1987 as a boutique consultancy in Unley, South Australia with a strong local presence, they have since strengthened and expanded their business. The merger with ACF Planning will expand their presence in QLD with offices in Cairns, Mareeba, Townsville, Rockhampton, Brisbane and now Mackay. Like ACF Planning, Poynter Hargraves is a privately owned company however they have their own Australian Financial Services License No. 237846, managing the business to benefit clients, not large institutions; providing appropriate advice to enhance your financial security.

We see this merger as an exciting opportunity to enhance the services and financial expertise currently provided to you, and to this end, we are looking forward to introducing you to some new staff. We will also be instigating more formalised regular reviews by either one of the existing staff or another of our professional staff and emphasising regular reporting including a quarterly newsletter to keep you up to date with current financial affairs. Importantly though, there will be no immediate changes to our office location nor our contact details.

You will notice some minor changes in our communications to you, but feel assured that if you have any questions, you may contact the office as you have always done. The trust you have placed in us to assist you to meet your financial objectives is a responsibility we take very seriously and I believe that this merger can only serve to enhance this end. By way of introduction to Poynter Hargraves, please see the attached Welcome Letter from them.

My role will be changing to one of consultancy within Poynter Hargraves, Janelle Goggan will be moving on to other endeavours and Poynter Hargraves will now be responsible for your ongoing financial planning needs. With the changing face of financial advice we have recognised the importance of increasing the level of professional service and strength of organised support to keep on assisting you with your financial journey.

**Office: 89 Sydney Street, Mackay Qld 4740**

**Postal: PO Box 1042, Mackay Qld 4740**

**T: 07 4957 7191**

**F: 07 3009 0049**

**E: [admin@acapfinancial.net](mailto:admin@acapfinancial.net)**



You will now need to decide to either move to Poynter Hargraves Financial Consultants Pty Ltd or remain with the current Licensee, Aura Wealth Pty Ltd. Irrespective of the decision you make, this will have no effect on your current policies/or investments you hold.

If you wish to remain with Aura Wealth and have them appoint a new authorised representative to service you please notify Aura Wealth within 5 business days of this letter by contacting:

Mrs Belinda Hough  
Aura Wealth Pty Ltd  
PO Box 1275, Slacks Creek QLD 4127  
Tel: 07 3317 4070  
Email: [Belinda.hough@aura.co](mailto:Belinda.hough@aura.co)

However, if you elect to move to Poynter Hargraves Financial Consultants Pty Ltd, they will become responsible for the advice provided to you effective from the date of transfer, as well as having access to all your personal and financial information.

If you do not give any such notification within 5 business days, then it will be assumed that you have chosen to move to Poynter Hargraves Financial Consultants Pty Ltd.

If you have any questions on the change of licensee or if you would like to discuss anything else, please call me on (07) 4957 7191.

Kind Regards,

A handwritten signature in black ink, appearing to read 'Mike Goggan'.

Mike Goggan

ACF Planning

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