

Policy Issue: Internal Dispute Resolution (IDR) Policy

Policy Date: 5 October 2021

Last Review: 27 October 2023

FYG Planners Pty Ltd (FYG) are an Australian Financial Services Licensee (AFSL No. 224543) who authorise Financial Advisers across the country. Should you have a complaint or grievance with any of FYG's representatives, you can contact FYG Planners directly to report it.

How can I lodge a complaint with FYG?

You can lodge a complaint with FYG by contacting our Compliance and Adviser Services Manager at:

Phone: (03) 6440 3555
Email: advisersupport@fygplanners.com.au
Address: PO BOX 389, Burnie TAS 7320

Please be prepared to identify yourself and those involved, advise of the nature of your complaint, when it occurred and your desired resolution (if applicable).

How will FYG handle my complaint?

FYG's Compliance and Adviser Services team will treat your complaint seriously and handle it in accordance with FYG's internal dispute resolution scheme, ensuring your privacy is not compromised at any stage. Upon notification of a complaint, FYG will begin an internal investigation and will seek to resolve your complaint within 30 days. At the end of FYG's investigation, you will be notified in writing and advised of the outcome and FYG's proposed resolution.

Is there an External Dispute Resolution Scheme I can report a complaint to?

Yes, there is. FYG Planner's external dispute resolution scheme is the Australian Financial Complaints Authority (AFCA). You can contact them directly should you wish to report a complaint.

Additionally, you can also contact AFCA if you are not satisfied with FYG's resolution in the first instance. You must contact AFCA within 2 years of the date of FYG's complaint response at the conclusion of our investigation, should you wish to escalate a complaint further.

AFCA can be contacted at:

Phone: 1800 931 678
Email: info@afca.org.au
Address: GPO Box 3, Melbourne VIC 3001