

Your 6 Step Guide To Booking Your Appointment Online

Step 1 – Select A Service

Choose from one of the following:

- a) For clients with an existing Fixed Term Service Agreement in place (ie. ongoing service arrangement) who have received notification from us that we're due for your annual progress review: please click on **“Existing Client – Annual Progress Review Appointment”**
- b) For new clients wishing to book their introductory consultation appointment (excluding those seeking advice/assistance with Aged Care and Age Pension matters) : please click on **“New Client – Introductory Consultation”**
- c) If you've received notification from us that your financial plan (Statement of Advice) is ready to present: please click on **“Financial Plan Presentation & Document Signing”**
- d) For those wishing to book an appointment seeking assistance with Aged Care and Centrelink Age Pension matters; or a follow up appointment following their initial consultation; or an existing client seeking an additional or ad-hoc review or discussion of their arrangements (ie. other than a standard annual progress review appointment); or those seeking an appointment for a matter not fitting any other category: please click on **“Other (eg. Aged Care, Age Pension, Ad-hoc Review, Follow Up Appointment etc)”**



Select service

Financial Plan Presentation & Docum... 2 hours	i	Existing Client - Annual Progress Revi... 1 hour 30 minutes	i
New Client - Introductory Consultati... 2 hours \$ 165	i	Other (eg. Aged Care, Age Pension, A... 2 hours \$ 310 per hour	i

Step 2 – Select A Date

Click on the preferred date for your appointment (Note: You may need to choose another date or the following month if no suitable times immediately appear)

05 March

< > March 2018

Mo	Tu	We	Th	Fr	Sa	Su
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

9:30 am 10:00 am 10:30 am
11:00 am 11:30 am 12:00 pm
12:30 pm 1:00 pm

ⓘ All times are in (UTC+09:30) Adelaide

Step 3 – Select A Time

Click on the preferred time for your appointment on the date you've selected.
(Note: You may need to choose another date or the following month if no suitable times immediately appear)

05 March

< > March 2018

Mo	Tu	We	Th	Fr	Sa	Su
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

9:30 am	10:00 am	10:30 am
11:00 am	11:30 am	12:00 pm
12:30 pm	1:00 pm	

ⓘ All times are in (UTC+09:30) Adelaide

Step 4 – Type In Your Details

Type in your name and contact details

Add your details

Name

Email

Phone number (optional)

Address (optional)

Please let us know if you have any special requests.
Thank you.

Notes (optional)

By clicking below you agree to the seller's [terms and conditions](#) and [privacy policies](#).

Book

Step 5 – Choose Your Preferred Meeting Format

Click on the “select on option” dropdown box and choose from either a Face-to-Face Office Appointment, Microsoft Teams Video Call or Telephone Call.

Provide additional information

Please select your preferred appointment format

--select an option--



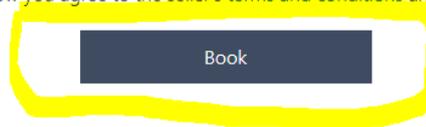
Step 6 – Complete Your Booking

Click on **“Book”** and you’re done! You should receive a confirmation email shortly afterwards as well as a reminder the day before your appointment

Add your details

Name	Please let us know if you have any special requests. Thank you.
Email	
Phone number (optional)	
Address (optional)	
	Notes (optional)

By clicking below you agree to the seller's [terms and conditions](#) and [privacy policies](#).



Thank you for using our online booking calendar. We look forward to our appointment with you.

PS. If all else fails and you want to book an appointment using the more traditional style, call us on 8294 3515 and we’ll be happy to help 😊