



bridgewater
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PLANNING YOUR FINANCIAL FUTURE

Portfolio Review Services

Our web site gives clients the opportunity to look at their own portfolio of investments and other aspects of their financial plan. We can issue a log in and password to clients to ensure the privacy of this information.

However, we provide review services where clients give us authority to review and recommend actions on their current holdings. When a particular issue arises we are able to contact and discuss with our clients in an easy and efficient manner. This may be to tell clients that news has been published or that a company has made an announcement. We know that our clients appreciate such advice and that they understand that it is impossible to telephone all clients in a short period. This web site will assist in the publishing of these notices.

Our portfolio review service takes the worry out of the client's hands, by ensuring that those portfolios are under ongoing review. The client has to make the decision on the action to be taken, but the advisor will contact the client with appropriate advice. The small cost to the client of this continual review service can usually be recovered from the results of timely and appropriate advice.

If you would like to take advantage of our free consultation or would like to know more about our services please contact us on (07) 3832 6020,
Email info@bridgewaterafs.com.au
or visit our website on
<http://www.bridgewaterafs.com.au>

Disclaimer: This document has been prepared for general information purposes only. Any advice contained in this document is General Advice which has been prepared without taking into account any of your objectives, financial situation or needs. Before acting on any General Advice you should consider the appropriateness of the advice by having regard to your own objectives, financial situation and needs.

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