

RodneyGibson

FINANCIAL SERVICES PTY LTD

We value your referrals

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Rodney Gibson Financial Services Pty Ltd (ABN: 45 119 229 980) is a corporate
authorised representative of Plan 2 Pty Ltd (ABN: 60 010 875 073)
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Referral Policy

At Rodney Gibson Financial Services, we are often referred to the family, friends and colleagues of our existing clients. This may be to help them with general financial planning, but often also to solve specific financial challenges including wealth creation, retirement planning, lending and insurance.

Because trust and confidentiality are key values of our business, we adopt certain standards to help us best assist any client's referrals in a timely and effective manner. Just in case you encounter a friend or colleague in the future that we may be able to assist, it is important to be aware of these standards as outlined in our Referral Policy.

- We maintain strict confidentiality. We do not discuss what services we may, or may not have provided for you or for anyone you refer to us.
- We have found we are best placed to assist clients with certain needs or objectives. We would be happy to outline these for you or discuss any potential referral if you are uncertain.
- As a courtesy, we ask for a brief introduction to anyone you refer to us. This may be via email, a phone call or even an invitation to one of our seminars.
- We place no obligations or expectations on anyone referred to us. We approach every referral as merely an opportunity to see if there is any "common ground" and whether we are best placed to assist them.

For more information about the types of people we are best placed to help, or how we could assist other people you know, please do not hesitate to contact us.