

**ISSUED BY:** AKUMIN PTY LTD  
ABN: 34 679 707 487

**ADDRESS:** AURORA PLACE, LEVEL 6, 88 PHILLIP STREET SYDNEY NSW 2000

**PHONE:** (02) 9904 2792

**DATE:** 31 MARCH 2025

## INTRODUCTION

At Akumin Pty Ltd (Akumin), we are committed to managing disputes in a fair, timely and transparent way. This policy is designed to provide you with information on how to lodge a complaint and our process when dealing with complaints.

This policy applies to our financial advisers and our mortgage brokers listed in the organisations below:

- Akumin Financial Planning Pty Ltd  
ABN: 89 051 208 327  
AFSL: 232706
- Hillross Financial Services Ltd  
ABN: 77 003 323 055  
AFSL: 232705
- Charter Financial Planning Ltd  
ABN: 35 002 976 294  
AFSL: 234665

## HOW TO LODGE A COMPLAINT

In the first instance, if you are unhappy with the services provided by your financial adviser or mortgage broker and you wish to make a complaint, please contact the Complaints Officer on the information below:

**Mail:** Complaints Officer (Akumin)  
PO Box R1872  
Royal Exchange NSW 1225

**Email:** [complaints@akumin.com.au](mailto:complaints@akumin.com.au)

**Phone:** 1800 812 388

## ASSISTANCE AVAILIABLE TO YOU

If you require assistance, you can contact us to help lodge your complaint.

## COMPLAINT PROCESS

There are three key steps when dealing with complaints, including:

1. **Acknowledgement:** Once we receive the complaint, you will receive acknowledgement within 24 hours of receiving it.
2. **Assessment and Investigation:** We will investigate and assess the complaint after gathering all the required information. This may involve speaking to you directly or to other relevant parties involved in order to gain a suitable resolution.
3. **Providing an Internal Dispute Resolution (IDR) Response:** We will provide you with written communication to inform you of the final complaint outcome.

## RESPONSE TIMEFRAME

We will investigate your complaint and respond to your concerns as quickly as possible and within 30 days. At times, due to the complexity of the complaint and availability of information, it may take longer to resolve. Where a delay occurs, we will contact you in writing and provide you with the reasons for the delay.

## AUSTRALIAN FINANCIAL COMPLAINTS AUTHORITY (AFCA)

If you do not agree to the reason for the delay or if you feel your complaint has not been resolved to your satisfaction, you may refer your concerns to the Australian Financial Complaints Authority (AFCA), which provides an accessible, fair and independent dispute resolution service. The contact details for AFCA are:

**Mail:** Australian Financial Complaints Authority Limited  
GPO Box 3  
Melbourne VIC 3001

**Email:** [info@afca.org.au](mailto:info@afca.org.au)

**Phone:** 1800 931 678

**Online:** [www.afca.org.au](http://www.afca.org.au)

## FURTHER INFORMATION

If you would like further information about how we handle complaints, please send us an email to [info@akumin.com.au](mailto:info@akumin.com.au) or call us on (02) 9904 2792.