



Compliments & Concerns

At Strategic Money Group, delivering an exceptional experience is at the core of everything we do. Your feedback, whether positive or constructive, plays an important role in helping us grow, improve, and maintain the high standards we hold ourselves to.

Whether you'd like to share a positive experience or let us know where we've fallen short, we genuinely want to hear from you. This document outlines how we handle both compliments and concerns, and what you can expect from us throughout the process.

Compliments

Great service deserves to be recognised. If Mark or a member of our team has gone above and beyond for you in any way, we'd love to hear about it. Sharing your experience not only means a great deal to us personally, and it also helps us understand what we're doing well and encourages that same standard across every client interaction.

Concerns

If at any point you feel we haven't delivered the level of service you deserved, please don't hesitate to raise it with us. We take every concern seriously and have put in place a clear, straightforward process to make it as easy as possible for you to be heard and for your issue to be resolved promptly and fairly.

When reaching out, please include as much detail as you can. Relevant dates, names and any reference numbers will help us respond to you as efficiently as possible.

Requesting a status update

Once you've lodged a concern with us, you're welcome to check in at any time for a progress update. Simply reach out via any of the contact methods on this form and reference your original communication so we can locate your case and respond without delay.

Our resolution process

Upon receiving your feedback, we will contact you within 24 hours to acknowledge your concern and confirm that it is being looked into. Our goal is to reach a fair and satisfactory resolution as quickly as possible. Should we require more than 30 days to complete our review, we will proactively contact you to explain the reason for the delay and provide a revised timeframe.

Once our review is complete, we will provide you with a written summary of our findings and the outcome, along with the reasoning behind our decision.

If you remain unsatisfied

We genuinely hope to resolve every concern directly and to your satisfaction. However, if after working through our process you remain unsatisfied, or if you have not received a response from us within 30 days, you have the right to escalate your matter to the Australian Financial Complaints Authority (AFCA), a free and independent service:

- Online:** www.afca.org.au
- Email:** info@afca.org.au
- Phone:** 1800 931 678 (free call)
- Mail:** Australian Financial Complaints Authority, GPO Box 3, Melbourne VIC 3001

Please be aware that time limits apply to AFCA complaints. We recommend visiting the AFCA website to confirm the applicable timeframe for your circumstances.

Feedback Form

Please complete the details below and return this form to us by email at info@strategicmoneygroup.com.au or by post to Strategic Money Group, Broadbeach QLD 4218.

Section 1 — Your Details

Full Name

Date of Submission

Postal / Email Address (for our response)

Phone Number

Preferred Contact Method (Phone / Email / Post)

Loan / Application Reference Number (if known)

Section 2 — Nature of Feedback

Please indicate the type of feedback you are submitting:

- Compliment — I would like to recognise exceptional service
- Concern — I have a question or issue I would like addressed
- Complaint — I am dissatisfied with the service or outcome I received
- Other — Please describe below

Section 3 — Area of Concern

Which area does your feedback relate to? (tick all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Advice or product recommendation | <input type="checkbox"/> Loan application or settlement process |
| <input type="checkbox"/> Communication or responsiveness | <input type="checkbox"/> Staff conduct or professionalism |
| <input type="checkbox"/> Fees or commissions | <input type="checkbox"/> Delays or timeframes |
| <input type="checkbox"/> Privacy or data handling | <input type="checkbox"/> Other |

Section 4 — Details of Your Feedback

Please describe your compliment, concern or complaint in as much detail as possible. Include relevant dates, names and any reference numbers where available.

Description

What outcome are you seeking? (for concerns and complaints)

Section 5 — Supporting Documents

Are you attaching any supporting documents with this form?

Yes — please list below

No

Documents attached (e.g. emails, statements, contracts, correspondence)

Section 6 — Declaration

I confirm that the information provided in this form is true and accurate to the best of my knowledge, and I understand that SMG will acknowledge my feedback within 24 hours and work to resolve any complaint within 30 days.

Signature

Date

Full Name (Print)

Strategic Money Group Pty Ltd | ABN 99 695 918 293 | Credit Representative 577451 authorised under Australian Credit Licence 569489
FBAA Member | AFCA Member

FOR OFFICE USE ONLY — Not for Client Completion

To be completed by SMG staff. Retain on client file for minimum 7 years per NCCP requirements.

Date Received

Received By

Reference / Case Number

Priority (Low / Medium / High)

Feedback Type (Compliment / Concern / Complaint)

Channel Received (Email / Post / Phone / In Person)

Action Taken / Investigation Notes

Date Acknowledged to Client (target: within 24 hrs)

Date Resolved (target: within 30 days)

Outcome / Resolution Summary

IDR Outcome:

- Resolved — client satisfied with outcome
- Withdrawn — client withdrew complaint
- Rejected — complaint outside our scope
- Escalated to AFCA — unresolved after 30 days or at client's request

If escalated to AFCA: advise client to act promptly as time limits apply. AFCA: www.afca.org.au | info@afca.org.au | 1800 931 678 (free call)

Broker Signature

Date Closed

Retain completed forms on client file for a minimum of 7 years. Internal Dispute Resolution obligations under NCCP Act 2009.
Strategic Money Group Pty Ltd | ABN 99 695 918 293 | CR 577451 under ACL 569489 | FBAA & AFCA Member