



FocusPoint Advisory Pty Ltd

Complaints Policy

Purpose

This policy explains how FocusPoint Advisory handles complaints and concerns from clients, prospective clients and other stakeholders.

Our Commitment

FocusPoint Advisory is committed to providing high-quality bookkeeping, reporting, advisory and Micro CFO services. We welcome feedback and take complaints seriously.

How to Make a Complaint

Complaints may be submitted by email, phone or in writing. Please provide details of the issue, relevant dates and the outcome you are seeking.

Acknowledgement of Complaints

We aim to acknowledge complaints within two business days of receipt.

Investigation Process

We will review the complaint, gather relevant information and assess the circumstances fairly and objectively.

Response Timeframes

We aim to provide a substantive response within 14 business days. If additional time is required, we will keep you informed of progress.

Resolution Options

Depending on the circumstances, resolutions may include clarification, corrective action, service improvements, fee adjustments where appropriate or other agreed outcomes.

Tax Practitioners Board Matters

If the complaint relates to BAS services or professional conduct, clients may also contact the Tax Practitioners Board (TPB) for information regarding the Code of Professional Conduct and available complaint processes.

External Review

If a complaint cannot be resolved directly with FocusPoint Advisory, clients may seek independent advice or contact relevant regulatory authorities where appropriate.



Record Keeping

All complaints will be recorded, investigated and retained in accordance with our record retention policies.

Continuous Improvement

Complaint information is reviewed periodically to identify opportunities to improve our services, systems and client experience.

Contact Details

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