Complaints Policy

1. Purpose and Commitment

At Visionary Wealth, we are committed to providing high-quality financial services and maintaining trust with our clients. We value your feedback and take complaints seriously. This policy outlines how you can make a complaint, how we will handle it, and your rights to escalate unresolved issues.

2. How to Lodge a Complaint

If you are dissatisfied with any aspect of our service, you can lodge a complaint by:

- **Phone:** 02 4926 7100
- **Email:** reception@visionaryadvisors.com.au
- **Mail:** Unit 2, 116 Tudor Street, HAMILTON NSW 2303
- **In person:** Unit 2, 116 Tudor Street, HAMILTON NSW 2303

Please provide as much detail as possible so we can address your concerns promptly.

3. Internal Dispute Resolution (IDR) Process

- **Acknowledgement:** We will acknowledge receipt of your complaint within one (1) business day, or as soon as practicable.
- **Investigation:** Your complaint will be investigated by our Complaints Officer or a suitably qualified staff member.
- **Response:** We aim to resolve all complaints within thirty (30) calendar days. If we cannot resolve your complaint within this timeframe, we will inform you of the reasons for the delay and provide regular updates on the progress.

Complaints Officer Contact:

- Name: Dene Jason Kilpatrick
- Phone: 02 4926 7100
- Email: denek@visionarywealth.com.au

4. Escalation to AFCA

If you are not satisfied with our response, or if your complaint is not resolved within 30 days, you have the right to refer your complaint to the **Australian Financial Complaints Authority (AFCA)**, an independent external dispute resolution scheme.

AFCA Contact Details:

- **Website:** https://www.afca.org.au
- **Phone:** 1800 931 678 (free call)
- **Email:** info@afca.org.au
- **Mail:** GPO Box 3, Melbourne VIC 3001

AFCA provides a fair and independent complaint resolution service at no cost to you.

5. Accessibility

This policy is available on our website and upon request. If you require assistance to lodge a complaint or need this policy in another format, please let us know.