



5th August 2022

Dear Client,

Crest Wealth has decided to move from our current licensee Synchronised Business Services PTY LTD which we have been with since 2015. We have had a great relationship with them during this time but have decided to apply for our own license.

Crest Wealth Advice PTY LTD will be responsible for all advice delivered to you moving forward along with your advisers Jesse Phillips, Robert Hayward & Paul Timms.

Please note Crest Wealth who you have been dealing with for a number of years now is not changing, we will still maintain the same staff with the same directors and owners. The only business change is that we will now be licensed to provide financial advice under a different licensee (Crest Wealth advice PTY LTD).

We welcome a review of any of your existing advice as always. Please reach out should you want to book in a review.

This change will **not** impact any advice previously provided to you nor any of your existing products.

Should, for some reason, you do not wish to continue as a client of Crest Wealth please notify us in writing within 14 days of the date of this letter and Synchronised Business Services Pty Ltd will return the servicing of your products to their respective product issuer.

This letter serves as an update on behalf of Crest Wealth and your existing adviser.

Should you have any questions please feel free to reach out.

Kind regards,

Crest Wealth Team

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