The information in this notice dated 1 October 2021, provides non-materially adverse updates to the ClearView Managed Investments Product Disclosure Statement (PDS) issued 27 November 2020. This update is issued by ClearView Financial Management Limited ABN 99 067 544 549 AFSL Licence No. 227677. It should be read together with the PDS and Additional Information document which are available at clearview.com.au.

About this update

This document incorporates information regarding changes to our Complaints Handling Policy to comply with the Australian Securities and Investments Commission’s (ASIC) Regulatory Guide 271 - Internal Disputes Resolution obligations.

Changes to the PDS

1. Complaints Handling Policy

A. On page 13 of the PDS, replace the section titled ‘Enquiries or complaints’ with:

If you have a complaint

At ClearView, we’re never satisfied when it comes to doing better and our customers are very important to us. If something goes wrong, we’re determined to make it right again. If you’ve had an experience with ClearView that you are not satisfied with, we’re here to resolve the issue.

If you have a complaint, please call us on 132 977 or write to the following address:

Complaints Manager
ClearView
Reply Paid 4232
Sydney NSW 2001
Email: complaints@clearview.com.au

We will acknowledge your complaint within one business day (being Monday to Friday except for public holidays in Sydney NSW) of receiving it, or as soon as practical.

We will address your complaint within 30 calendar days (or within any extended period you approve). If you are not satisfied with how we respond to your enquiry or complaint, or we have not dealt with your complaint within 30 calendar days (or within any extended period you approve), you may lodge your complaint with the Australian Financial Complaints Authority (AFCA). AFCA is the external dispute resolution scheme for financial services complaints. AFCA provides fair and independent financial services complaint resolution that is free to consumers.

Website: afca.org.au
Email: info@afca.org.au
Phone: 1800 931 678
Mail: Australian Financial Complaints Authority
GPO Box 3
Melbourne VIC 3001

Need more information?

Please speak to your financial adviser or contact our Service Centre on 132 977.
Reply Paid 4232
Sydney NSW 2001
132 977
client.wealth@clearview.com.au
clearview.com.au

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