


About the Licensee

Charter Financial Planning Limited ABN 35 002 976 294 AFS Licence No. 234665, a member of the AMP group, assists people and businesses from all walks of life in reaching their financial goals. Charter Financial Planning offers a comprehensive advisory service on a wide range of financial planning matters.

Charter Financial Planning supports the standards of financial planning practices that are Certified Quality Advice Practices with dedicated resources. Because quality financial advice is seen as such an important differentiator in the provision of financial services, the accreditation is also highly valued and standards are constantly reviewed. Consequently, failure to continue to meet the guidelines will result in accreditation being withdrawn.

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Certified Quality
Advice Practice 

Experience the difference



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 charter financial planning

The benefits of being a Certified Quality Advice Practice

The CQAP program sets an industry benchmark for providing high quality financial planning advice.

In order for a business to be recognised as a CQAP practice, it must meet stringent criteria. The certification is awarded based on industry qualifications, ability to demonstrate best practice standards and proven success in servicing the financial planning needs of clients.

We promise our clients:

Contentment

The highest priority is placed on meeting our clients' expectations. We offer a superior and comprehensive financial planning service.

Confidence

We complete a thorough client analysis to ensure our strategies and service solutions are tailored to your needs.

Clarity

All our financial planning fees will be clearly outlined and agreed with you before we proceed.

Comfort

As recognised leaders in the financial planning industry, we receive priority access from teams of specialists in legislation, investment research and product solutions. This ensures that our clients benefit from the latest financial planning tools and information, giving you greater peace of mind.

Competency

You can be assured that we are skilled in the provision of financial advice and services. Our advisers exceed industry standards for education and training.

We abide by a strong code of ethics and are dedicated to ongoing professional development. This results in compliant, high quality and specialised financial planning advice.