

IMPLEMENTATION, DATA UPDATE & REPORTING



What you will provide to CLEAR Planning

- Scanned copy of Authority to Proceed
- Certified ID (if not previously provided)
- Signed Authority to Implement form

What CLEAR Planning will do

- Lodge applications
- Liaise with product providers - via phone and online updates to ensure applications are processed correctly
- Provide regular progress updates - on the progress of all applications and advise immediately should there be any issues that need resolution that are beyond our authority
- Update FP software with updated details
- Ensure all ongoing service tasks are set up in FP software

Delivered ASAP from client authority

- Regular Progress Updates provided throughout process
- Confirmation Reports provided upon completion (see samples)
- Employer information pack (for super) provided upon completion (see sample)

\$299
incl GST