

New communications branding

Welcome to our 2009 Winter issue of AXIS Directions.

As you'll see, this popular quarterly publication has undergone a serious make-over. We've always received positive client feedback about the content of Directions and we thought it was time to refresh its look and feel. We trust you find the new design enhances your reading experience and welcome your comments and suggestions.

New website www.axisfg.com.au

However, it's not just our hard copy publications that have been re-branded. We've also invested considerable time overhauling our website – both visually and technically.

AXIS has been a leader in the provision of corporate and personal superannuation solutions throughout Australia for 15 years. During that time, we've developed a reputation for providing proactive, quality advice and service excellence. And, with increasing client demand for real time information, education and greater interactivity, we wanted to ensure our online capabilities matched our clients' expectations.

New Online Services section

We're particularly excited about the new Online Services section of the website, as it provides you with easy access to our advisory services.

While we strongly reinforce the benefits of onsite meetings with member groups or individuals, we appreciate that it's not always possible for members to attend our information sessions at the arranged time. However, with our Online Services section, you and your members now have an alternative means of communicating with your adviser. With the addition of this new capability, we aim to enhance our performance and service even further.



Changes to internal processes and documentation

During the development phase of our new website, we also reviewed our advisory processes to ensure our goal of "making corporate superannuation easy" was being achieved.

Feedback from clients suggested that some of our existing documentation was overly complicated, potentially leading to the failure to complete forms. Accordingly, we have adjusted our internal processes to deliver advice quicker and in a more user friendly format.

Initial client testing of and response to these new processes has been highly positive and we're extremely grateful to those of you who took the time to participate and offer feedback.

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Future website developments

Over the next year, we aim to further improve our publications through greater use of email and associated links. This will allow you to click on any headline of interest and be directed immediately to the article via the link.

We're also working towards integrating our internal Client Management System with the website, to allow members to download a secure, summary report of their personal account. Our main reason for this enhancement is to offer greater simplicity of information.

Our experience shows that clients are happy to receive their bi-annual or annual statement. However, they find the comprehensive nature of the content a little overwhelming.

Once integrated, our corporate clients will be able to view a single page highlighting:

- account balance as at the most recent reporting period;
- address details;
- whether your Tax File Number has been received and recorded;
- whether an AXIS Portfolio has been chosen and if it is the latest option available;

- whether a personal selection was made for the investment portfolio or whether you remain in the default portfolio; and
- the status of your binding nomination of beneficiary.

For individual clients in certain products, the summary will highlight:

- current account balance;
- current performance return;
- current address;
- whether your Tax File Number has been received and recorded;
- whether an AXIS Portfolio has been chosen and if it is the latest option available;
- whether a personal selection was made for the investment portfolio or whether you remain in the default portfolio; and
- the status of your binding nomination of beneficiary.



Other service developments from AXIS Financial Group

Over the past year, we've also been highly focused on encouraging employee and individual clients via email to contact us to improve their super arrangements. Our initial objective was focused on improving the number of beneficiary nominations on record within each employer group. However, we're delighted to report that this specific servicing campaign prompted other calls to action, thereby resulting in even more comprehensive super arrangements for these clients.

If this is a service you believe would benefit your organisation, we'd be pleased to assist. And, remember, this service is part and parcel of our servicing agreement and incurs no additional costs. AXIS has the capability to indirectly service your workforce by selectively developing advisory campaigns that educate, challenge and stimulate. The outcome is that your employees pay more attention to their super. Such campaigns can be integrated with our AXIS Informer publications or even with onsite group sessions to ensure employees value their super and derive maximum benefit from it.

With super being an employee entitlement that provides considerable benefit to the workforce, an increasing number of our employer groups have asked us to co-badge our communications with both the AXIS and the employer logo. We've found this process to reinforce the significant positives of super to both employers and their employees.

Princess Margaret Hospital Foundation

Thinking of others – it's a feel good thing or things!

Princess Margaret Hospital (PMH) is well known for its tremendous work with treating sick children. AXIS Financial Group participates in numerous programs offered by PMH, partly to assist in fundraising efforts for hospital equipment, but also because it promotes staff bonding and relationships. Ultimately, it's a win/win situation for everyone involved with an organisation as brilliant as PMH.

The PMH Urban Descent

Following last year's Boardroom Blitz, AXIS employees were keen to do more for PMH, but also to challenge themselves more as a team. Thus, the idea to enter the Urban Descent arose (pardon the pun).

This involves abseiling down the light towers at the WACA to a level of your choice, with a head first descent being an option. As part of the team (now known as the AXIS Hot Pockets) challenge, our objective is to raise \$5,000 for the PMH Foundation. Although we're well on our way to achieving this target, it would be fantastic to exceed our goal. So, please feel free to donate by going to the following link: http://www.mycase.com.au/mycase/raise_money/fundraise.php?id=3094.

Thanks to the PMH Foundation for providing the AXIS team with so much fun and positive experience in building our teamwork. And thanks too, to everyone who has already made a donation.

We welcome your feedback

If you have any feedback or suggestions in relation to our new website or any of our services, please email us at advice@axisfg.com.au

From both a professional and personal perspective, it's essential for us to know that we're moving in the right direction.

Adviser Team

Welcome to the Adviser Team in AXIS Financial Group. Peter will shortly appear as the lead singer in the PMH Boardroom Blitz. He has also played hockey for the under 21 WA State Team as a colt. So, apart from his skills as a qualified CFP, he has a habit of excelling when performing.

John is the newest addition to the team, joining AXIS from Adelaide. As a Crows fan, I'm sure everyone in the West welcomes him to the best state in Australia.

Mark has already been with AXIS for a number of years as Technical Manager. He has shared many tremendous achievements with the Technical Team and is now lending his skills to assist the Advisory Team.



The Adviser Team: Peter, John and Mark

The Boardroom Blitz

The first Boardroom Blitz in honour of raising funds for PMH was held in 2008 with the AXIS rock band (yes, real AXIS staff members performed!) finishing somewhere in the prizes. But, then again, every band received a prize! I'm delighted to report that everyone involved practiced avidly in rehearsals to perform three rock classics in front of an enthused audience. At least they seemed enthused. We prefer to think they were laughing with us and not at us!

The second Boardroom Blitz will be held at the Metropolis Nightclub in Northbridge on **Sunday, 9 August 2009**. Once again, a number of corporate bands will be competing and, while you might be having haunting visions of amateur night, we'd love to have your company. What's more you'll be helping the PMH Foundation and enjoying a laugh. If you're interested in joining us, you can purchase tickets by calling Bec at the PMH Foundation on **9489 1121** or book online – **www.pmhfoundation.com**

List of locations

Whilst the majority of our clients are in Perth and WA, Axis Financial Group provides services to the following locations:

WA

Albany Henderson Moora
 Australind Kalgoorlie Northam
 Broome Karratha Port Hedland
 Bunbury Mandurah Rockingham
 Burrup Margaret River Varanus Island
 Busselton Merridin Wagin
 Geraldton

SA

Adelaide

QLD

Brisbane
 Cairns
 Townsville

NSW

Griffith
 Newcastle
 Sydney

ACT

Canberra

NT

Darwin

VICTORIA

Melbourne
 Mildura

OVERSEAS

Canada
 Dubai
 Hong Kong
 Nigeria
 Papua New Guinea
 Tanzania
 West Africa
 Yemen

