



We work with financial planners around Australia who want to build great advice businesses.

WHAT WE DO

It's not easy being a financial planner, you spend a lot of time with your clients - making sure their financial plans adapt and change as their lives take their twists and turns.

And, as a professional you need to keep abreast of not just the regulatory change that affects your clients, but also the changes that affect you. Things like keeping up your Continuing Professional Development, making time for further study and developing your soft skills.

On top of all this, you're running your own business. And with increased competition from things such as robo-advice and direct insurers, it's becoming more difficult to attract and retain quality clients.

This is where we can help.

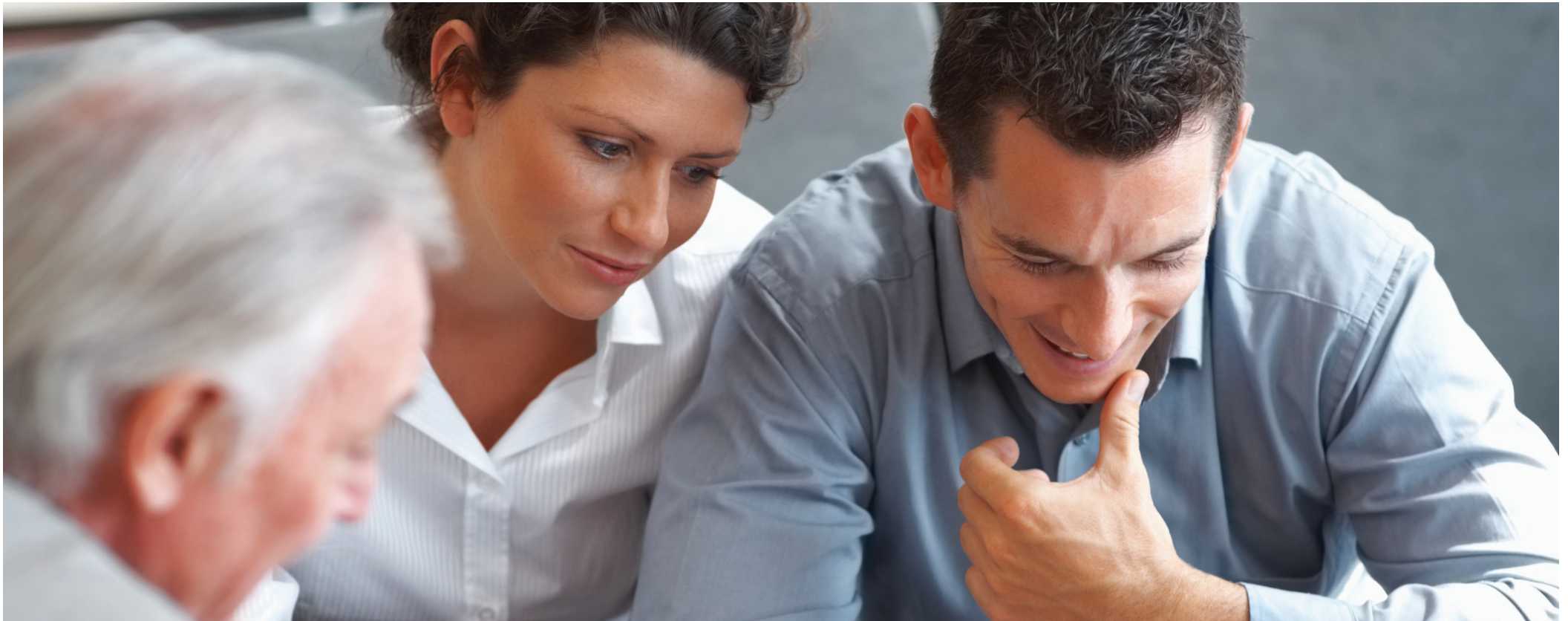
We don't just provide licensee services. We work with you to build an advice business that you can be proud of.

Our Licensee team has the experience and skills to help you take your business to the next level – whatever that looks like for you.

We can help you acquire new clients via introductions to the Elders branch networks. Our systems and processes enable you to give quality advice backed up by world-class research and technical resources. And, our business coaching specialists will help you stay motivated and focused on the big picture, so you can build an advice business you're proud of.



Financial Planning



Sound Business Advice

Our Regional Managers and support specialists have years of experience with advice businesses. Between us, we've owned businesses, sold businesses and worked with a wide range of advisers ranging from start-ups to mature businesses.

So the challenges you're facing are probably the same ones we've helped with before.

We provide face-to-face support to help you achieve your best. We'll take the time to help you define your business goals, and then we'll work with you to turn them into reality. Our planners tell us they value our ability to help them remain focused on their goals.

Making Advice Delivery Easier

One of the big issues advisers are telling us about is the need to be able to give advice more efficiently.

We have access to a customised version of Xplan that includes a number of advice wizards that will make it easier for you to provide quality advice in a timely manner.

We're also partnering with a number of external providers such as SuiteBox and Paraplanner.com.au to give you access to tools and resources to help make your business more efficient.

If you're interested in learning more about how we can help, please call 1800 060 741 to find out more.



Financial Planning