



Services Offered

ALL AE ADVISERS HAVE ACCESS TO THE FOLLOWING SERVICES
THESE SERVICES ARE DELIVERED AT NO ADDITIONAL COST TO THE ADVISERS

Licensee Services

- Payment tracking done through Worksorted and payment system which is run monthly
- Monthly drop off reports to provide you details of the clients policies that are not being paid
- Worksorted CRM, a client database we provide that allows you to manage your clients and monitor revenues, etc.
- CPD points update report to assist you to keep track of your CPD points earned
- Monthly newsletter for news update for all AE advisers
- Back office support services to assist you in your financial planning tasks so you can have more time with your clients
- Audit / pre-vet files and documents to ensure that all is up to date and in compliance
- On shore conference that happens every year for all AE advisers
- Site visit by the CEO & EO
- Own identity, you can brand AE or keep your own branding
- Open APL for risk and platform
- Offer of equity to practice principles
- Business status survey
- Post appointment survey
- Professional Indemnity Insurance

Back Office Support Services

- Data collection
- Review and complete fact find sheet
- Product research on super and insurances
- product / insurance comparisons through the software you are using
- Preparing insurance quotes
- Complete initial meeting file notes
- Preparing application forms
- Check for additional requirements and ensure that relevant paperwork is fully completed prior to lodging
- Lodgements or Implementation
- Follow up with the product providers until completion
- Handle Worksorted tasks:
 - Prepare drop off reports
 - Generate FDS
 - Assist in updating and adding templates
 - Import revenue
 - Do client revenue matching
 - Add new clients or update client details in database
- Sort client files in your online filing system
- Do admin tasks like making business cards, editing flyers, making letterheads, update MS or Excel documents and the like
- Prepare PowerPoint presentations
- Create Survey Monkey and monitor survey responses
- Record CPD certificates to CPD Evolve Learning System (FEP online)
- Prepare Client Review Letters