



WizeTalent Proposal



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CONFIDENTIALITY AGREEMENT

All information concerning this proposal is confidential. Confidential means that you are free to talk about the service, but you are not permitted to disclose or share to others the processes, templates, files and any of the same form inclusive of the service.

No information may be released without appropriate authorization from WizeTalent. This states the entire agreement between the parties concerning the disclosure of Confidential Information. Any addition or modification to this Agreement must be made in writing and signed by the parties.





Developed by Wize Mentoring,

WizeTalent is an end-to-end recruitment consultation service

for practice owners looking for their next ideal team member.
WizeTalent is THE most comprehensive and detailed solution when
it comes to helping you analyse, attract, assess and accept a
qualified person for your practice.



WizeTalent will help you to:



Assess your current team structure and capacity plan to identify which role to advertise for



Craft the perfect job description and advertisement



Manage candidate applications and shortlisting ideal candidates



Conduct your own effective interviews with candidates



Complete due diligence on shortlisted candidates via tech checks and references calls



Provide the successful candidate with a job offer



Structure a comprehensive onboarding process with your successful candidate and newest team member

Between the proven step-by-step system and working with our mentor team who've personally hired hundreds of ideal team members over the last 20+ years, you'll condense years of knowledge and experience into finding your next ideal team member in a matter of weeks.

how it works:

Analyse

Determine your next hire

- First, you will have an initial detailed consultation with the Wize mentor team to review your capacity plan and confirm the role to hire for
- The WizeTalent team will then set you up with our step-by-step system to follow and set expectations of actions required

25%

50%

75%

100%

Assess

Shortlist ideal candidates

We will assist you with:

- Assessing completed applications and shortlisting candidates for interview
- Conducting the first interview with an ideal candidate (additional interviews may be purchased)
- A Step-by-step process on how to conduct an effective interview for all other short-listed candidates
- Determining which candidates are best suited to the role
- A Step-by-step process to reference check & tech-check shortlisted candidates
- Recommended assessment / testing to complete based on the role requirements

Attract

Find qualified candidates

We will provide you with:

- The job description and advertisement templates and assist with their completion
- Access to a dedicated online portal to help you collate applications and screen ideal candidates
- Guidance on what platforms to post job ads on and assistance in posting on suggested platforms

Accept

Onboard successful candidate

We will provide you with:

- A guide for compensation package, suggested salary range and letter of offer template
- A template contractor agreement
- A step-by-step onboarding process for your successful candidate

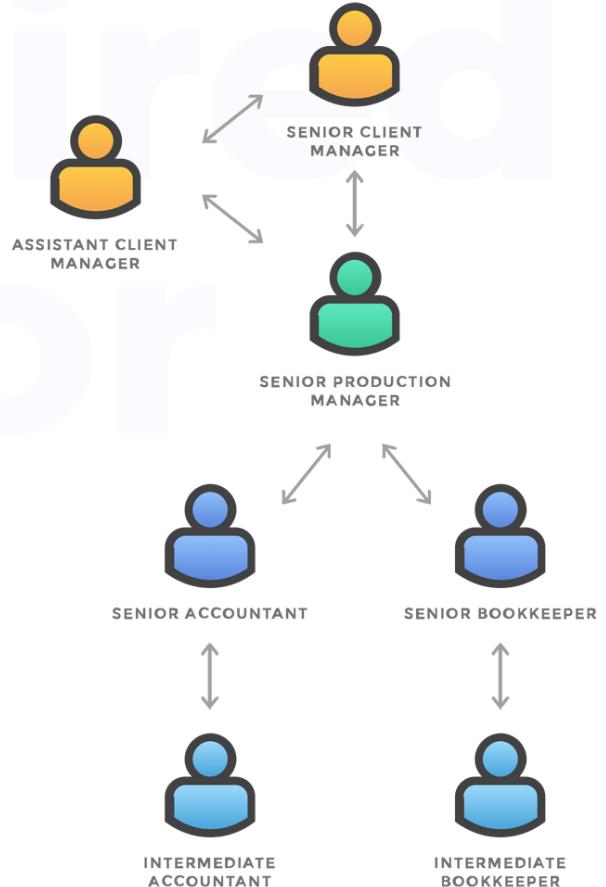


roles hired for

**Structuring a Team for Growth
Get the Right People Doing
the Right Work**

WizeTalent will make a recommendation on the role to be hired for based on our signature Wize Deep & Narrow Ideal Team Structure framework.

WIZE IDEAL TEAM STRUCTURE



FINDERS

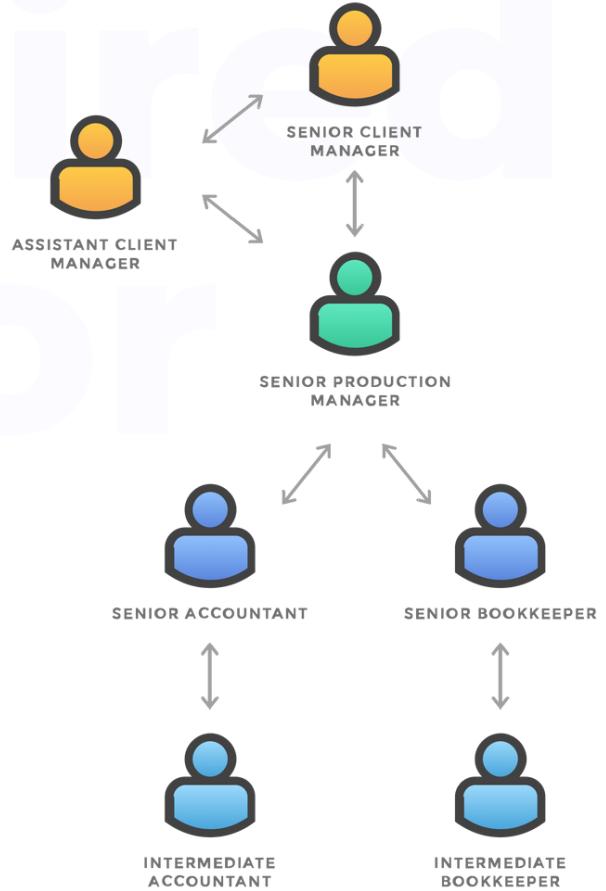
Client Managers

Hiring for Client Managers normally occurs “onshore” or in the practice’s hometown as the role requires the person to work hands-on in managing clients and team members.

The ideal candidates for the role of Client Manager have very high interpersonal skills, communication skills and are able to effectively build and maintain relationships with your clients whilst searching for new opportunities on better ways to serve clients.

Finding qualified and ideal Client Manager's requires a very specific set of recruitment steps and assessment criteria which WizeTalent will provide you with.

WIZE IDEAL TEAM STRUCTURE



MINDERS

GRINDERS

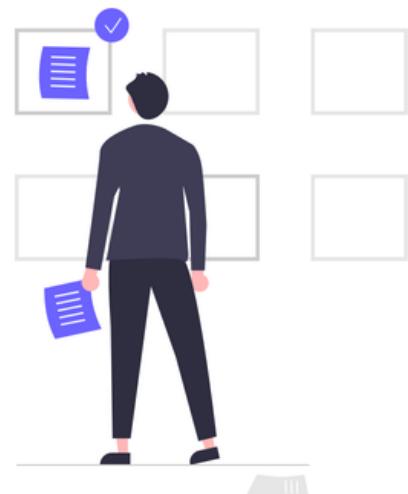
Senior Production Managers,

Accountants & Bookkeepers

Hiring for a minder / grinder role can take place either “onshore” in your hometown or “offshore” via a contractor arrangement in the Philippines or a country of your choosing. Based on our extensive experience in hiring team members offshore, we would recommend that you look to recruit candidates in the Philippines.

Finding qualified and ideal Minders & Grinders requires a very methodical recruitment process to ensure you identify ideal candidates and also assess the effectiveness of their working conditions. WizeTalent will provide you with the exact steps to successfully undertake this.

THE WIZE mentors



Ed Chan

Co-Founder at Wize Mentoring
& Founder of Chan & Naylor



Jamie Johns

Co-Founder at Wize Mentoring
& Founder/ CEO of Sky Accountants



Michael Ferris

Mentor at Wize Mentoring
& Principal of Probooks Accounting



Thomas Sphabmixay

Mentor at Wize Mentoring
& General Manager at TMS Partners



Timothy Causbrook

Mentor at Wize Mentoring
& COO at Causbrook & Associates



Kristy Fairbairn

Mentor at Wize Mentoring
& Owner of The Business Oasis



We're really thankful to the Wize team for helping us with our recruitment in the Philippines via WizeTalent. We are absolutely delighted and we wouldn't want to do it any other way.

- Warren Marris,
Director of Magnus Group

WHAT CLIENTS ARE SAYING





If you are considering offshoring you MUST use WizeTalent. Jamie and the team have developed a great system and will hold your hand throughout the process. It is efficient and painless. I honestly could not have done it without them. I am now thinking about hiring an office admin!

- Jason Brown, Director,
Integra Business Advisors

WHAT CLIENTS ARE SAYING

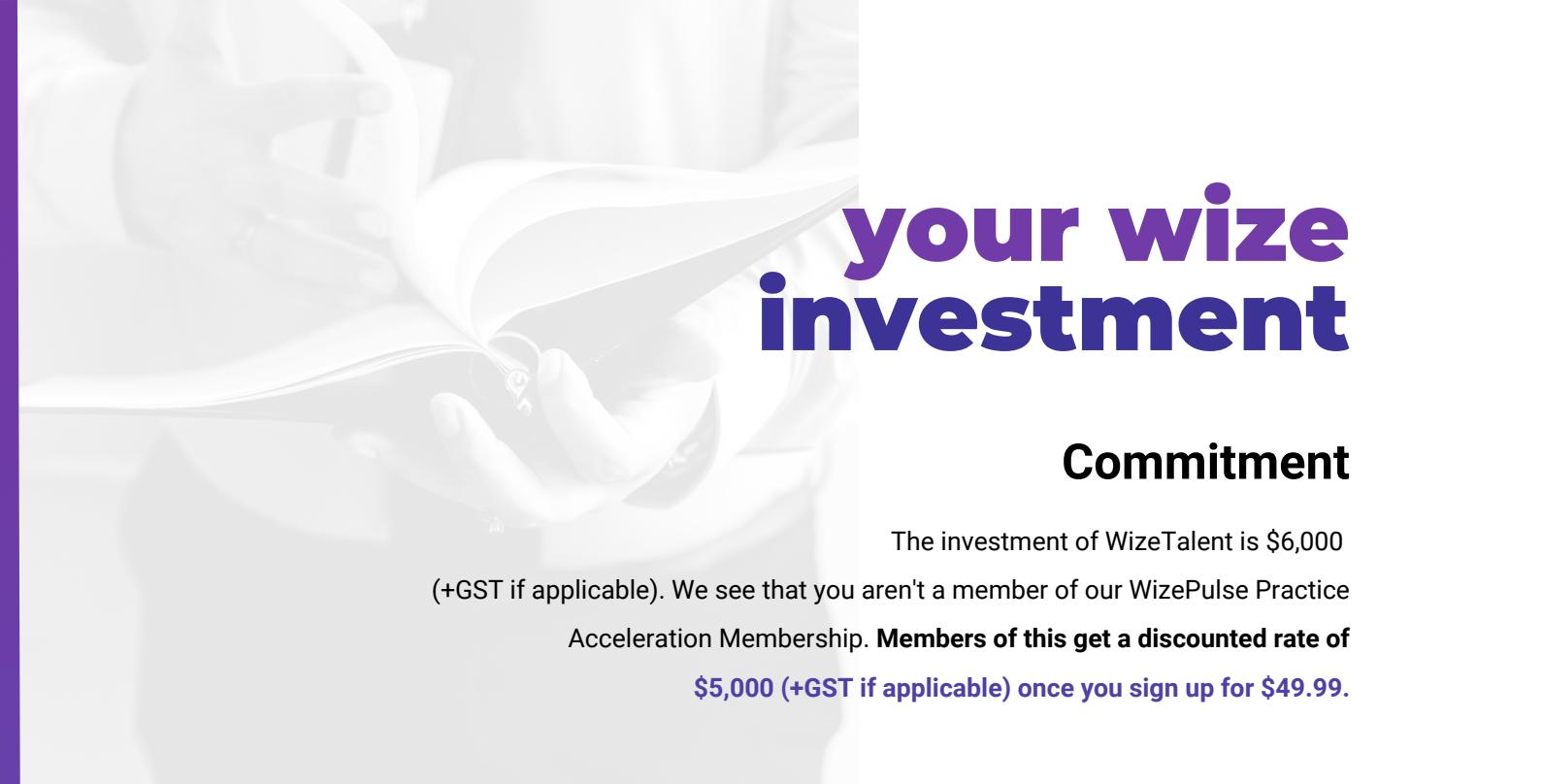


If you are considering recruiting from the Philippines, I would highly recommend you use WizeTalent to help you. I am just wrapping up my first hire (today fingers crossed) and could not have done it without Jamie Johns. He helps you every step of the way AND throws in a lot of mentoring. Don't do it alone, this is NOT the same as hiring onshore. I have been a leader for over 15 years and interviewed probably a hundred Americans....not the same. This is not a paid endorsement, simply an encouragement for anyone that is on the fence. 100% investment in your balance sheet! Feel free to reach out to me if you have questions!

- Jessica Gonifas, Owner at Silver Peaks
Accounting Services LLC

WHAT CLIENTS ARE SAYING





your wize investment

Commitment

The investment of WizeTalent is \$6,000 (+GST if applicable). We see that you aren't a member of our WizePulse Practice Acceleration Membership. **Members of this get a discounted rate of \$5,000 (+GST if applicable) once you sign up for \$49.99.**



Cost Considerations

As part of the WizeTalent recommended process, there are additional costs to consider as follows:

Additional Guided Interviews

Wize Mentors will conduct one guided candidate interview with you if required. Additional interviews can be purchased for \$500 (+GST if applicable).

Accounting Test

We will recommend that you assess the knowledge and technical skills of shortlisted candidates using the Accountests platform, to which we have negotiated discounted rates as follows:

- Graduate / Trainee Accountant Test – USD \$40.00
- Double Entry Accounting Test – USD \$40.00
- Part / Non-Qualified Accountant Test – USD \$200.00
- Bookkeeper / Assistant Accountant Test – USD \$150.00
- Chartered Accountant Skills & Knowledge Test – USD \$200.00

Job Portals

Posting your job ads on certain platforms can come with a cost. From experience, a guide on these costs are as follows:

- Seek (AU/NZ) - A\$285.00 +GST to A\$1,495 +GST per ad
- Jobstreet (PH) - Php 9,520 / USD \$199 per ad

*Currencies are in PHP, AUD and USD

Offshore - Non-Wize

next steps...

If you are ready to take immediate action and get your WizeTalent hiring process started right away, then the next step is to:

1

Review and sign off the terms
and conditions of the WizeTalent
service in the pages that follow.

2

Complete our secure
commencement form
to start the service.

3

Respond to our WizeTalent team
promptly when they contact you
to organise your consultation.

WizeTalent has the potential to change your hiring process and able to hit the right leads, but in short, we've found that to get the best results you must be coachable, open to learning from other experts, & follow procedures.

Stay humble & act fast!

faqs

DO WIZETALENT TAKE CARE OF THE WHOLE HIRING PROCESS?

WizeTalent is not responsible for finding candidates for you; we equip you with the exact process and the right tools so that you can do this successfully with our mentor's guidance.

DO WIZETALENT CONDUCT THE JOB INTERVIEWS?

We will conduct one guided interview to show how it's properly done using the phone screen guide. However, if you don't have the luxury of time, mentors can do it for you at an additional cost as outlined.

ARE YOU A RECRUITMENT AGENCY?

No, we are not. We are a consultative service to provide you with the process, tools and guidance for sourcing the right candidate for your practice.

WILL A CANDIDATE BE DIRECTLY HIRED BY OUR PRACTICE?

Yes. All candidates will be directly hired by you.

DOES THE PACKAGE INCLUDE FEES FOR PLACING JOB AD ON RECRUITMENT PLATFORMS?

No. What we do is to give assistance in posting your ad into different job boards available. However, additional advertising expenses may be required.

WHAT TYPE OF TESTS ARE GIVEN TO ASSESS THE CANDIDATE?

We recommend using the Accountest platform to assess the technical knowledge of a candidate. These tests are dedicated for accountants and bookkeepers of all levels. This is a paid service that you'll purchase separately. We'll give you a code for a discounted price.

HOW DO YOU INTERPRET THE TEST SCORES?

Accountest sends the interpreted result to your email right after the test has been completed by the candidate. We will provide you a summary of scores to cross-compare candidate results.

IS THERE A GUARANTEE ON HIRING SOMEONE?

We do not offer any guarantees on finding a successful candidate. We also do not guarantee employee retention or candidates not working out.

Your WizeTalent service will remain valid for a period of 6 weeks. If you have not successfully found a candidate by this stage, we will re-convene to discuss your options and required next steps.

If in the extraordinary circumstance where your new team member does not show up on the agreed start date, let us know and we will assist in finding a replacement.

WizeTalent program application for acceptance

Firm Details:

Company Name

Primary Contact Name

Contact Email

Company Address

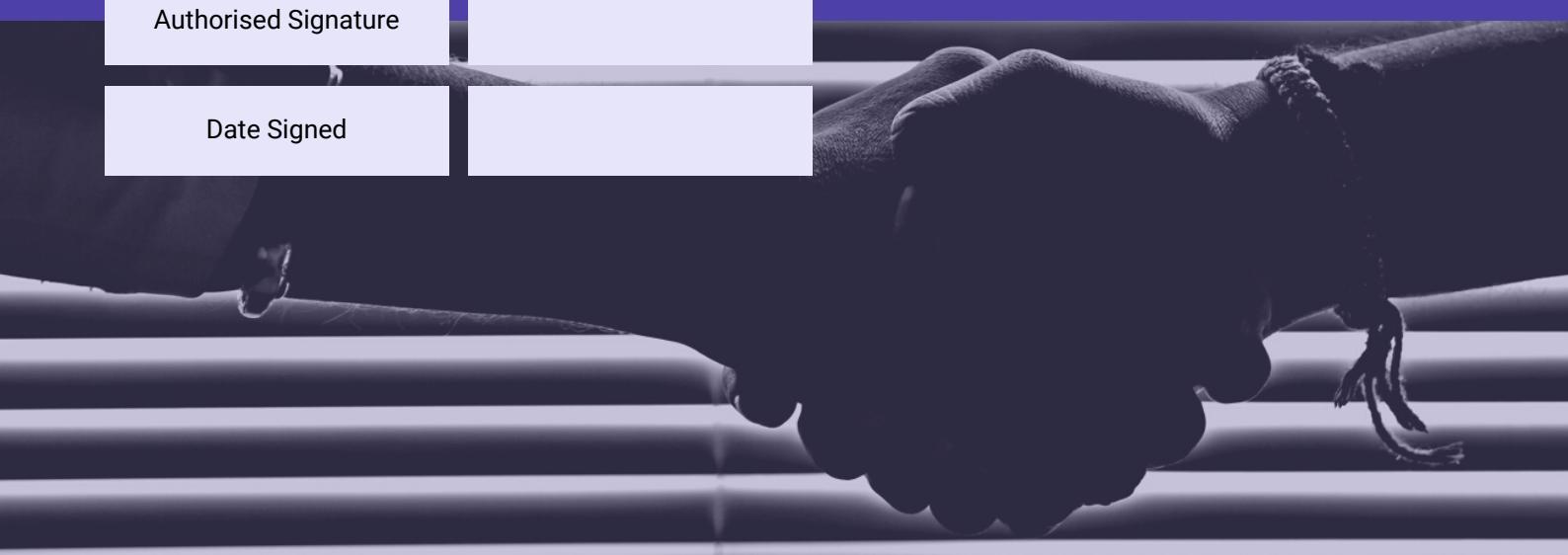
Contact Phone Number

Acceptance:

Let's get started! My signature indicates I have read and agreed to the terms and conditions overleaf and authorizes Wize Mentoring to get us started in the WizeTalent Program. If this implementation plan is not accepted on or before the end of the current month, the plan will be deemed null and void.

Authorised Signature

Date Signed



WizeTalent

the legal stuff

SERVICE AGREEMENT

Investing in this service will give you a tried and tested recruitment process and the tools to recruit your staff member in-house, so you can avoid having to pay recruiter commissions or recruitment/seat fees to a BPO for offshore staff.

Please read this Service Agreement carefully which outlines WIZE Mentoring Pty Ltd (ACN 626 462 557) ("WizeTalent") terms and conditions.

By proceeding, you accept, without limitation or qualification the Service Agreement.

1. Interpretation

This Service Agreement is governed by the laws of New South Wales and the parties submit to the non-exclusive jurisdiction of the courts of that New South Wales.

In the interpretation of this Service Agreement:

(a) Confidential Information means all information received, acquired or created by you during the course of or in connection with this Service Agreement, including information about WizeTalent's products, processes, systems, equipment, dealings, transactions, policies, finances, organisation or personnel, or about those of its clients or anyone associated with it or them, including but not limited to creative development: concept development, names, titles, images, logos, motion graphics, design and production of all media associated with any project.

(b) References to legislation or provisions of legislation include changes or re-enactments of the legislation and statutory instruments and regulations issued under the legislation;

- (c) Words denoting the singular include the plural and vice versa, words denoting individuals or persons include bodies corporate and vice versa, words denoting one gender include all genders, and references to documents or agreements also mean those documents or agreements as changed, novated or replaced;
- (d) Grammatical forms of defined words or phrases have corresponding meanings;
- (e) Parties must perform their obligations on the dates and times fixed by reference to the capital city of Sydney;
- (f) Reference to an amount of money is a reference to the amount in the lawful currency of the Commonwealth of Australia;
- (g) If the day on or by which anything is to be done is a Saturday, a Sunday or a public holiday in the place in which it is to be done, then it must be done on the next business day;
- (h) References to a party are intended to bind their executors, administrators and permitted transferees; and
- (i) Obligations under this agreement affecting more than one party bind them jointly and each of them severally.

2. Provision of the Services

The parties agree that WizeTalent must:

- (a) provide an initial detailed consultation with the WizeTalent mentor team to confirm the role;
- (b) assist with all documentation for tailored job descriptions and ad posts;
- (c) provide salary guidelines for various roles;
- (d) provide a dedicated portal to help you collate applications and screen ideal candidates;
- (e) provide guidelines on what platforms to post job ads on and provide assistance;

- (f) provide a step-by-step hiring guide to conduct relevant interviews and reference checks;
- (g) provide access to mentor team to assist in the facilitation of one candidate interview;
- (h) provide access to mentor team to soundboard which candidates are best suited to the role;
- (i) provide documented guidelines on onboarding new staff including equipment checks, contract agreements and suggested onboarding training;
- (j) equip you with the exact process and the right tools so that you can do this successfully; and
- (k) exercise all due care, skill and attention in providing the services.

3. Services not provided

The parties agree that WizeTalent:

- (a) is not responsible for finding available candidates for you;
- (b) does not offer any guarantees on successfully recruiting the desired candidate;
- (c) does not offer any guarantees on new employee retention / candidates not working out; and
- (d) does not conduct more than the allocated interview quota but gives you the tools to conduct an effective interview. Additional interviews with a WizeMentor can be purchased at an additional expense. and
- (e) is under no obligation to disclose any information or updates regarding the employment prospects of your candidate(s) and/or employee(s). This includes whether such candidate(s) and/or employee(s) (including your current employee(s)) have applied for employment with another WizeTalent client or are the subject of the recruitment efforts of another WizeTalent client. WizeTalent's policy is to respect and uphold the confidentiality of the recruitment process.

4. Use of candidate information

You warrant that WizeTalent reserves the right to maintain information regarding all candidates on their records for 6 months. If a candidate does not accept a position with your organisation, WizeTalent may share the candidate's information with other organisations.

If WizeTalent passes the introduction to a third party, that party will be liable for all legal obligations in relation to the candidate.

5. Your obligations

- (a) You must:
 - (i) provide a detailed brief to WizeTalent including a job description, experience/qualifications required, locations available, hours, training/support provided;
 - (ii) bear the sole role responsibility for selecting a candidate for engagement and your decisions shall be final;
 - (iii) satisfy yourself on the suitability of the candidate including verifying all statements made on or by the candidates' behalf, in particular (without limitation) the candidate's references, immigration status, qualifications, training, and registration to their own satisfaction;
 - (iv) organise any checks or courses for the candidate if required.
- (b) You are exclusively responsible for the candidate throughout the engagement including health and safety and supervision of each candidate and if appropriate, ensuring the candidate maintains their registration and ensuring the candidate does not work past their visa end date.
- (c) When engaging a candidate, you undertake to fulfill all other legal obligations as the employer of the candidate.
- (d) When communicating with the WizeTalent team, you agree to respond to all communication in a timely manner (within 24 hours of communications being received).

6. Service Fee

In consideration of WizeTalent providing the services, you must pay WizeTalent the Service Fee in advance of the service commencing.

7. Goods and Services Tax ("GST")

Unless stated otherwise and subject to this clause, any amount required to be paid or consideration required to be provided under any other provision of this Service Agreement, is calculated to be inclusive of GST.

8. Confidentiality

- (a) WizeTalent agrees that during the course of this Service Agreement, it will be acquainted with or has access to Confidential Information.
- (b) WizeTalent must during and after the Service Agreement take all steps necessary to safeguard the confidentiality of all Confidential Information.
- (c) Without your prior written consent, WizeTalent must not directly or indirectly, in whole or in part:
 - (a) use, disclose, cause or permit the disclosure of the Confidential Information for any purpose other than to perform the obligations under this Service Agreement;
 - (b) take any action to invalidate, put in dispute or impair in any way your interest in or use of the Confidential Information;
 - (c) for whatever reason, either for yourself or through any third party, appropriate, copy, memorise or in any manner reproduce any of the Confidential Information.
 - (d) Without prejudice to the other provisions of this clause, either party may disclose the Confidential Information if the disclosure is required by law or is required or compelled pursuant to a court order.
 - (e) Nothing in this Service Agreement imposes an obligation with respect to maintaining confidence regarding information which is in the public domain otherwise than as a result of a breach of this agreement or other obligation of confidence.
 - (f) This clause shall have force after the termination or expiry of this Service Agreement.

9. Your Warranties

You warrant at all times that:

- (a) you have the power and authority to enter into this Service Agreement; and
- (b) you will comply with all statutory provisions, regulations, orders and by-laws of any government, municipal or statutory authority which relate to the provision of the Services.

10. Limitation of Liability

You warrant at all times that:

- (a) WizeTalent does not provide any warranty as to the suitability of the candidate.

It is hereby affirmed that WizeTalent is not responsible for any work undertaken by the candidate and does not accept responsibility for any loss, expense, damage or delay, sustained by you however occasioned.

- (b) WizeTalent makes no representations or guarantees that a candidate will achieve a certain level of performance, achieve a certain outcome, solve a particular problem, or attain a specific goal.
- (c) WizeTalent will not be liable to you for any loss or damage however incurred as a result of entering into any agreement. The Competition and Consumer Act 2010 ("CCA") may confer rights on you which cannot be excluded, restricted or modified ("non-excludable rights"). WizeTalent does not exclude any non-excludable rights but does exclude all other conditions and warranties imposed by custom, law or statute.
- (d) You hereby release and indemnify WizeTalent (and our affiliates, our officers, directors, agents, subsidiaries, joint ventures and employees) from any and all claims, demands and damages (actual and consequential) of every kind and nature, known or unknown, including, without limitation, any taxes, fees or costs arising out of or in any way connected with to the services or connected to this agreement.

11. Force majeure

Neither party shall be liable for any default due to any act of God, terrorism, war, strike, lockout, industrial action, pandemic, fire, flood, drought, storm or other events beyond the reasonable control of either party.

12. Severability

If any provision of this Service Agreement is to be declared invalid or unenforceable, it shall be severable and shall not affect the remaining provisions of this Service Agreement.

13. Termination

- (a) WizeTalent shall have the right to terminate this Service Agreement if you:
 - (i) are in material breach, or is in any other breach not capable of remedy, of any of its or obligations under this Service Agreement;

(ii) you are in breach of any of its warranties, undertakings or obligations under this Service Agreement; or

(iii) suffer the making of an administration order or has a receiver (including an administrative receiver) or manager appointed of the whole or any part of its assets or if an order is made or a resolution passed for its winding up (except for the purpose of amalgamation or reconstruction) or if it enters into any composition or arrangement with its creditors or if it ceases to carry on business.

(b) If such termination is disputed, it shall be dealt with in accordance with the dispute resolution provisions of this Service Agreement.

14. Dispute resolution

(a) If a dispute arises, before any proceeding is commenced the party claiming that a dispute has arisen must give 14 days' notice to the other party setting out the dispute and seeking discussion and compromise to resolve the dispute.

(b) If after 14 days, the dispute is not resolved then it must be referred to mediation on the same terms as those ordered by the Supreme Court of New South Wales and the costs of the mediation shall be borne by the parties equally.

(c) Nothing in this clause will prevent either party from seeking urgent interlocutory relief.

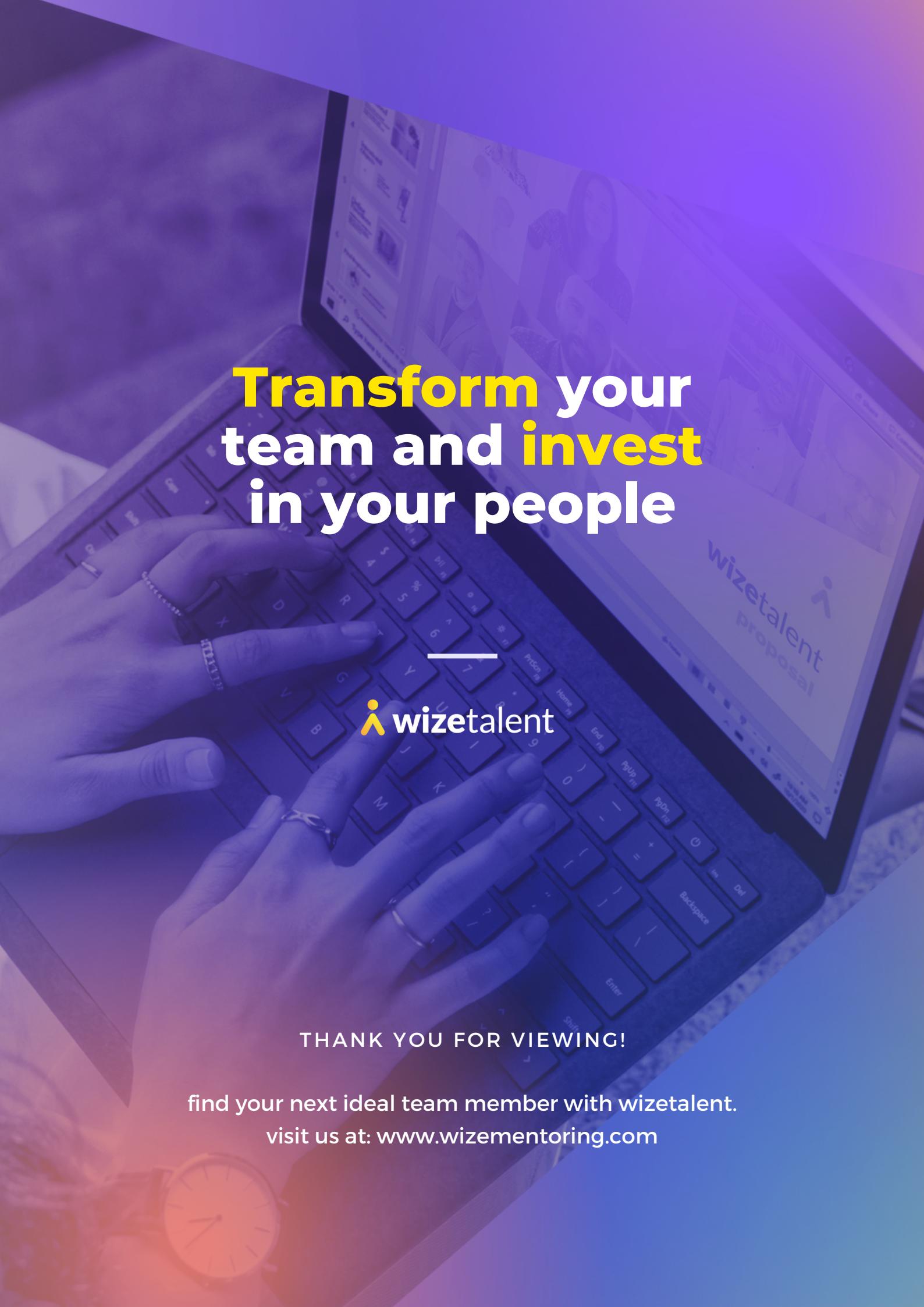
15. Notices

A notice or other communication to a party must be in writing and delivered to that party or that party's practitioner in one of the following ways:

(a) delivered personally; or

(b) posted to their address when it will be treated as having been received on the second business day after posting; or

(c) sent by email to their email address when it will be treated as received when it enters the recipient's information system.



Transform your team and invest in your people



THANK YOU FOR VIEWING!

find your next ideal team member with wizetalent.
visit us at: www.wizementoring.com