

Authorised Representative Offer



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Overview

- A cost effective Authorised Representative Status via our network of AFSL Groups.
- The ability to expand your client services and income streams into Mortgage Broking and Accounting without the risks involved with referring to an external third party.

AFSL Network Options



Alpine Financial Advice

Gold Coast Based Dealer Group



REDWOOD FINANCIAL SERVICES

Melbourne Based Dealer Group



Lionsgate Financial Group
Pty Ltd

Sydney Based Dealer Group

Costs

\$2,400 p.m + GST per Adviser

Based on \$300,000 p.a or less gross revenue

Entitlements



Compliance Entitlements

Access to our Experienced Compliance Team:

- Induction Training
- Six Monthly Client File Audit
- Strategy & Advice Assistance
- Practice Support
- Personalised One on One Training



Software Entitlements

Access to P2P Professional:

- Revenue Reporting
- Sales, FDS & Practice Trackers
- Task Management
- Yodlee Client Data Feeds
 - Client CRM
- Advice Preparation
- APL & Product Data
- Omnilife Insurance Quoting



Additional Entitlements

Access to:

- Reduced PI Insurance Excess
- Kaplan CPD Software
 - Extensive APL
- Marketing support
- Networking events
- Office on demand
- Mentoring

By harnessing the power of our digital ecosystem P2P Group makes the journey effortless for professionals and their clients.

A blend of Licensing, Services and Products catering to the needs of Allied Accountants, Mortgage Brokers & Financial Advisers.