



## AMAFA - The boutique, Dealer group

Established in 1999, originally as a Mortgage Broking Practice, AMAFA has grown into a Full Financial Services company. We have both an Australian Financial Services Licence (AFSL) and an Australian Credit Licence. The foundation of our business is based on providing an ethical, honest, and professional service. Our APL is comprehensive and offers a wide range of Risk, Super and Investment products. (We have an open mind to adviser specific product requests). We are a boutique Dealer group with Advisers in most States. supported by our Operations Manager, Responsible Managers and a dedicated administration and support team. We are proud of our track record in terms of Compliance and Conduct.

## What you can offer your clients

Mortgage and Finance broking

Personal Risk Insurance

Superannuation and Financial Planning

Commercial and Business Finance

Asset Finance

Personal Loans

Retirement Planning

Estate Planning

AMAFA aggregates through Connective for our mortgage and finance offerings.

All personal insurance and financial planning are controlled in-house with independent agreements in place with product providers.



## Why you should join our Boutique Dealership

Our Advisers have **FREE** access to Connective's awarding winning CRM-Mercury. Which integrates seamlessly with our Proprietary Platform **Mainstay**, so no need for double input. Once again access to **Mainstay** is provided **FREE**, so no more subscriptions to Adviser Logic or X Plan. Record your client relationships in an effective and professional manner and most importantly, compliance becomes part of your sales process.

## What can Mainstay do for You?

- Generate and complete online Fact Finds
- Produce Compliant, Comprehensive and Professional Statements of Advice
- Offers a fully integrated Asset Allocation Tool
- Set and save Model Portfolios for ongoing use
- Features our Quick Life Risk Premium Quoting Tool
- Capacity for new features and ongoing development through our inhouse development team

## Key Benefits

Our independence is important to us. Being part of Connective and leveraging, leading edge technology solutions allows us to have the same resources available to big business without sacrificing our independence.

You can maintain your professional development through regular professional development days and are able to keep in touch with like-minded professionals – sometimes a luxury only available in larger practices.



Our own in-house Mentorship Program at a small fee for Advisers new to the industry, as well as the standard 2 Year mentorship program required for Mortgage Brokers.

A simple, robust compliance regime with ongoing support. All Advisers are required to complete an online self- assessment questionnaire every 60 days. to ensure our obligations as an AFS/ACL licence holder are fulfilled, as well as our ASIC requirements. External audits are also coordinated by the Dealer group (see fee inclusions).

A comprehensive, inhouse paraplanning service, at very competitive rates. This added value service will allow you to manage your compliance and administration efficiently, and spend more time in from of your clients.

An Adviser-friendly agreement that acknowledges client portfolio ownership which is also highly competitive in the market.

Our environment makes it easier for you to do what you do best – Run your own business! Our ethos is all about supporting our Advisers to the best of our ability and we recognize the need to also have fun in everything we do. Being part of the AMAFA family, means you will have access to personal engagement form the Dealer group, excellent product and industry support from the AMAFA aligned BDM's at the Product Providers and the opportunity to attend our PD days and most importantly our annual Conference which is supported and attended by the Industry Provider representatives.

## What will all this cost you?

### We have three tiers of Associate Fees:

**Tier One** – Designed for new starts which has a generous commission split and a small monthly fee.

**Tier Two** – Designed for a seasoned Financial Adviser with a solid client base, which has a very small percentage commission retention by the Dealer group and a monthly fee, or 100% commission being retained by the Adviser with a monthly fee.

**Tier Three** – Designed for Adviser Practices with up to five Sub authorised Advisers, with 100% commission being retained by the Practice and a very competitive monthly fee structure for the Practice.

All our monthly Associate Fee Tiers includes:

- Professional Indemnity Insurance.
- Ongoing CPD training through Kaplan On Trak
- Annual ASIC Adviser Levy
- No ongoing software costs (A savings of up to \$5000pa!)
- Two external compliance audits pa
- Annual membership to A.F.C.A



Want to hear more?

Call me for a confidential chat around our fees and what we can do to support you and your business!

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