

Finchat for advisers:

Making financial planning efficient, accessible and affordable



slow, costly process. Bans on conflicted remuneration and commissions has seen revenue drop for many dealerships while the compliance costs have increased.

Financial planning can be a

Speaking on the ifa Show podcast, Netwealth joint managing director Matt Heine noted that every stage of the advice process is "totally riddled with friction", saying it's a paper-based, laborious, complex and tedious process. Its also a costly process and the

cost has to be recovered from the client. The success of your financial

advice practice hinges on its efficiency. The more a computer can do, the easier it is to make a profit.



Finchat for advisers do Finchat saves time / cost in a

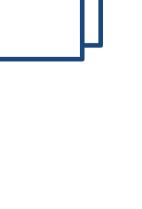
What does

number of ways; Online fact find saves the



dealership time and money.

submitted as a CSV and PDF



file. The CSV could be imported into financial planning software Online health check helps users uncover needs. The

Fact find and needs analysis is



in CSV and PDF formats Each adviser in dealership can have their own page with profile, fact find and health

check saving time on-

boarding and ramping up

session is sent to the adviser



marketing. The page is hosted by Finchat with the adviser's logo and look/feel Quick access to financial planning articles saves time on research



Quick access to compliance RGs reduces compliance breaches



Finchat doesn't recommend



How does

complimented by an simple info-gram and a calculator. Read about a topic and then

use the calculator to test

different scenarios. For

example, try increasing or decreasing contributions to see the effect on the final balance in your super. Down load the info-gram as a quick reference or share it by email with a client.

Customers and prospects can access the fact find and health check online where they will complete and submit them to

the adviser.

Which topics can advisers investigate?



CREATE WEALTH INSIDE SUPER How does super work, Types of super, Do I have enough super?, TTR, Account Based Pension, Consolidate super, Fees in super, All contribution

CREATE WEALTH OUTSIDE SUPER

Investment risk profile, Shares, Fixed interest, property, cash, ETFs, Managed funds, currency and robo-advice

Do you have enough death and disability cover? Is your income protected?

types: Employer, Salary sacrifice, Spouse, Government and Down-sizing

Do you have enough trauma cover?

LIFESTYLE CALCULATIONS

Choosing a better job, Paying off debt, Cost of travel, Wedding costs, Rent or buy, budgeting and Education costs

PROTECT WEALTH

MYPLAN

Users check their financial health. Retirement planning, Debt ratio, Budget, Risk exposure, Estate planning and Education costs

COMPLIANCE

compliant.

Advisers have easy access to important RGs from ASIC helping them stay

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