



The next practice in business solutions

Paraplanning

Outsourcing Services

Overview

iQ:eQ's Paraplanning Services provides support for financial planners and Dealer Groups in their Statement of Advice creation process.

The aim of our ParaPlanning services is to assist our clients with the timely preparation of high quality and compliant Statements of Advice and Review Reports.

iQ:eQ's Paraplanning solution involves working with your business processes, templates and preferred way of operation to ensure we support your business the way you want it. The Statement Of Advice can be prepared using your templates and wording to ensure a customised service for your clients.

The completed Statement Of Advice are forwarded to you in a format requested such as a printed bound version, an electronic word file or both.

How does it work?

Process and Engagement

To ensure the full customisation of this service to your needs the following process is followed:

1. Understanding Your Needs

- We will liaise with you to determine which templates you wish to use, ascertain your recommended list, asset allocation vs. risk profiling methods and preferred means of receiving the completed Statement of Advice.
- The agreed process will be documented using a checklist

2. Statement of Advice Implementation

- Implementation of agreed process including request forms, first interview notes and strategy
- Customisation of templates and presentation (if required)

3. Generation of SoA

- Generation of SoA within an agreed timeframe (generally iQ:eQ uses a 5 day turnaround time as our benchmark), commencing from the date all completed details are received
- All SoAs completed based on customised templates
- All SoAs received in format requested.
- SOA Presentation provided with completed SOA if requested

What do we Offer?

- An outsourced solution to meet the excess demand for Statement of Advice each month.
- No formal contractual arrangement that sets out or limits the number of Statement of Advice produced.
- A dedicated iQ:eQ liaison person to ensure that all your requirements are being met on an ongoing basis.
- A 5 day turnaround period for the completion of Statements of Advice once all necessary information has been obtained.
- An emailed copy of the Statement of Advice directly to the Dealer Group Paraplanning Unit.
- Customised templates / Statement of Advice that look and feel like those produced by the Dealer Group Paraplanning Unit.
- A simple monthly invoicing procedure.
- A team of friendly and highly competent individuals who know and are passionate about your business which means the delivery of a professional service.
- A commitment to continuous improvement in the services we provide.

Statement of Advice Price Guide

iQ:eQ's Paraplanning Price Guide is displayed in the following table.

Stage 1	<ul style="list-style-type: none"> ▪ Limited Advice SoA's 	Contact iQ:eQ
Stage 2	<ul style="list-style-type: none"> ▪ Standard SoA's which include: <ul style="list-style-type: none"> ➢ Rollover & Simple Investment ➢ Regular Savings Plan ➢ Consolidation of Superannuation ➢ Lump Sum Contributions ➢ Debt Minimisation 	Contact iQ:eQ
Stage 3	<ul style="list-style-type: none"> ▪ Comprehensive SoA's which include: <ul style="list-style-type: none"> ➢ Super withdrawal and re-contribution ➢ Retirement Income strategy using complying structures ➢ Retirement Income strategy using Allocated Pension ➢ Non ETP annuities ➢ Commutation for Retirement income streams ➢ Consolidation of Retirement Income Streams ➢ Social Security ➢ Gearing – Lump Sum or Instalment ➢ Redundancy 	Contact iQ:eQ
Stage 4	<ul style="list-style-type: none"> ▪ Multiple Entity SoA's which include: <ul style="list-style-type: none"> ➢ SMSF ➢ Company Structure ➢ Defined Benefit 	Contact iQ:eQ
	<ul style="list-style-type: none"> ▪ Alternative Strategy Projections 	Contact iQ:eQ
	<ul style="list-style-type: none"> ▪ Risk analysis and recommendation required in addition to any of above 	Contact iQ:eQ