

# Everyone has plans...



# Welcome to Consultum

## **Our focus is on your success**

Consultum is a national boutique dealer group, founded on the belief that the most important investment we make is in our relationship with our advisers.

Everything we do is about this commitment - from understanding your individual practice requirements - to the development of a close partnership and plan to successfully achieve them. We operate with best practice, placing value on service and transparency.

## **Our history**

Consultum was born from the merger of two leading Australian financial planning groups - Winchcombe Carson Financial Planning and Financial Partnership.

Established in 1979, Winchcombe Carson was one of Australia's pioneering financial planning groups. Launched in 2002, Financial Partnership was one of Australia's first lifestyle financial planning groups seeking strong ongoing relationships with clients throughout every life-stage. The combination of these two professional, established groups means that Consultum has the experience, strength and commitment to be a dynamic force in the Australian financial advice market.

## **Seeing a bright future**

For now, and into the future, Consultum is focused on ensuring our financial advisers are across the latest developments in superannuation, investments and insurance, software and IT, government legislation, and compliance. We're uniquely qualified to assist our advisers in all these areas and more, because we have the right combination of skills, product and services, and management.

While Consultum enjoys the financial support of the IOOF brand we operate as a separate business, with our own licence. Consultum Financial Advisers are governed by an Australian Financial Services Licence issued by the Australian Securities and Investments Commission (ASIC).

We cover Australia, with a head office in Melbourne and a network of more than 100 advisers in over 60 offices across Australia.

Consultum offers the support and expertise needed to guide the way. Our specialised, boutique structure ensures you always experience a personal service. In particular, when you call Consultum, you have the assurance of contact with a Consultant, not a call centre.

**At Consultum, our commitment is simple, we support you in creating and managing a successful, sustainable advice business so you can focus on increasing the financial wealth and protection of your clients.**

# Adviser Focused

In today's competitive market, the most successful dealer groups are able to offer something unique to advisers. Naturally, high quality and timely support in the operational and regulatory areas of your business is a standard at Consultum. The Consultum difference is our commitment to delivering a truly "adviser focused" offer – one that is tailored, practical and personalised. We work with you to build a profitable, sustainable and thriving business.

## **Cadetship Program**

Consultum recognises the need for professional businesses to have a succession plan. Our Cadetship Program assists Authorised Representatives in employing an additional Authorised Representative for their business. Funding is provided in Year 1, relieving financial pressure on your business.

## **Marketing and Communications**

The success of your business relies on your ability to attract and retain clients. So to help you grow and build value in your business, we provide a range of marketing and communications services. The Consultum Marketing team supports advisers with the development of tailored marketing campaigns and access to a wide range of marketing materials and tools including an industry leading, cost-effective solution and ongoing support for a tailored website for your practice.

## **Business Improvement Program**

Using a range of industry-leading financial modelling tools, our Business Improvement Program helps our advisers segment their client base, create a relevant value proposition, develop a strategic and sustainable business plan and address important issues such as succession planning.

# We're with you every step of the way

## Attractive rebate program

Consultum offers a competitive and attractive operating model that rewards advisers based on their overall revenue generation and not product specific sales.

## Inhouse Research Team

Consultum provides our advisers with an in-house research team, so you have direct access to the latest technical and research bulletins and market and industry updates.

### Standard Services

Professional Standards - Compliance

Research

Technical services and Para-planning

Training and Education

Brokerage Administration

PI Insurance

Adviser Recognition Program

### The Consultum Difference

Dedicated in-house full time staff to integrate Xplan software solutions

Unique Cadetship Program

Tailored marketing and communications support

Demonstrated Business Improvement Program

Attractive Rebate Program

In-house Research Team

Board of Advice and Committees

Equity participation in an ASX listed company

## Technology & Software support

Consultum has developed a unique software solution for advisers utilising Xplan. It enables us to deliver our intellectual property including client management, platform data feeds, advice templates, marketing collateral, approved product lists and model portfolios all in one system, while helping to reduce your costs and administrative burden.

The Consultum Xplan software offers the following unique features:

- Templated workflows already built into the system;
- Centrally administered automated data feeds from master trusts listed on our APL; and
- Option to seamlessly outsource para-planning to the IOOF Para-planning team through the use of the 'Virtual Para Planner'.

## Xplan Webinars

As part of the ongoing Xplan support provided to advisers and their practices, the Consultum Software Solutions team also run Xplan Webinar training sessions every month. The webinars are designed to demonstrate new Xplan features and provide refresher sessions on existing modules, and can be completed without members of each practice having to leave the office.

The Consultum Xplan software solution is supported by a specialised, dedicated team of full time in-house Software Consultants who will spend time with you at your practice to enhance your software experience. Additionally, they provide consultation on the transition of your business to Xplan, as well as training, coaching and helpdesk functionalities.



**At Consultum we pride ourselves on being a boutique dealer group - its enabled us to develop a deep understanding of the goals and motivations of our adviser's businesses and earned us a reputation of being a highly personalised, adviser-focused group.**

# Realise your plans... Partner with Consultum Financial Advisers today.

## Let's Talk

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