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**Professional Solutions – SUPERANNUATION Solution.**

(effective from 1/4/2009)

**1. Have you ever turned potential Superannuation clients away because their balances were too small?**

**2. Would you like to help them and earn more money?**

**3. And potentially a lot more in the future?**

**All with no extra capital outlay or effort from yourself.**

Via our Professional Solutions Division, eJobs Financial Planning now offers two superannuation products that allow your receptionist or administrative staff to tap into this client segment easily.

These products make superannuation advice more affordable to low-value clients, address recent government concerns regarding the removal of trails from Super Guarantee payments, and will help you transform your business to *Fee-for-Service*.

Please contact either Trevor Punnett or Jeff le Compte to discuss these products further.

**1. Retail Superannuation Comparison & Health Check Report Service**

**What is it?**

Each client receives a professionally prepared and presented Statement of Advice report comparing their existing superannuation fund situation against other funds. This service locates and performs a 'health check' on client funds and provides advice on superannuation funds.

The client can also choose which funds they would like to have compared with their existing Funds. You may elect default funds or have these included in a fund list the client can select from.

The cost of the SoA report is paid out of the client's superannuation fund and the client can ask for an updated report at any time for no additional cost. Reports are 'ongoing' and are provided at least once per year. Clients can go online anytime to register their changed circumstances and ask for a new report.

## Benefits for the Financial Planner / Planner Practice:

This Fee-for-Service product is primarily aimed at Low Value / Low Balance Superannuation clients who might otherwise be turned away because they require too much work for too little return.

There is a simple application form an administrative person can fill out quickly with the client. This allows you to focus on your more HNW clients whilst still providing a valued service to this lower value client segment.

Importantly, the client remains *your* client. You can track and monitor their balances, promote other products, and see when their circumstances change.

This product will build a pool of future full service clients as their balances grow and provide more regular income for no capital outlay.

## Benefits for Client:

This product will provide professional advice, the cost of which is borne by the client's superannuation fund, and can be deducted from their balance weekly or monthly. There are no trail commissions.

It is quick and easy to arrange with three simple forms to be completed (takes about 10 minutes).

### Fees, Terms & Conditions

Retail Superannuation SoA	\$385* paid by Clients Superannuation Fund p.a.	\$110* per annum paid to Adviser as Fee-for-Service
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\* Includes GST

## 2. Corporate Superannuation Comparison & Health Check Report Service

### What is it?:

If you have corporate super clients we can provide our superannuation comparison and 'Health Check' Report to each member each year.

As with the retail product, all SG trail commissions are dialed down to 0% and replaced with the \$385 report service to protect your SG income. You will receive \$110 per member per year for very little work as this is all outsourced to report service.

All members get continuing advice through their web site log in.

Depending upon volume, the Report can be 'white labeled' to your Dealer Group.

### Fees, Terms & Conditions

Corporate Superannuation SoA	\$385* paid by Clients Superannuation Fund p.a.	\$110 per annum paid to Adviser p.a. as Fee-for-Service
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\* Includes GST

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Please send me more details and/or call me to arrange a meeting to discuss these products in more detail:

Name: ..... Company: .....

Signature: ..... Date: .....