

You've got your Limited Licence... so now what?

Brought to you by



SIGN UP TODAY FOR OUR ONGOING SUPPORT PACKAGE

We have developed a formula to take the stress out of complying with the Limited Licence requirements.



YOU WILL RECEIVE:

- Step by step guidance to making licensing work
- Insights from industry experts Kath Bowler, Paul Derham and their teams
- Flexible add ons for additional accountants
- **Plus a BONUS 12 month Transition Program**

ADVICE DOCUMENTS	RESOURCE LIBRARY	ONGOING TRAINING	MONTHLY UPDATES
<p>Our cloud based advice software solution generates your advice documents, including SOAs.</p> <p>L4A's software partner</p>	<ul style="list-style-type: none"> • Updated compliance manual • Risk register • Adviser manual (including adviser tools such as fact finds) • Template client letters 	<p>Meet your ongoing RG146 requirements.</p> <p>Training will include:</p> <ul style="list-style-type: none"> • Face to face workshops • Webinars • Self paced learning materials 	<p>Keep informed of regulatory and licensing changes through Holley Nethercote's monthly email compliance update <i>TRex</i>.</p>

FROM
\$550
PER MONTH*

Ongoing Support Package including 12 Month Transition Program

Price covers all services for one Responsible Manager. Reduced costs apply for additional people, depending on the number of Responsible Managers, the number of accountants providing advice and the components you select for those people.

Minimum 12 months commitment with a total cost of \$6,600. *All prices are inclusive of GST.

SIGN UP TODAY! Email info@L4A.com.au or Phone 1300 930 328

L4A.com.au



The L4A Transition Program

BONUS 12 MONTH TRANSITION PROGRAM

STEP BY STEP GUIDANCE FROM LEADING INDUSTRY EXPERTS

In your first year of joining, you will receive our structured L4A Transition Program as a bonus to help you implement your Limited Licence successfully. The dates for the next intake are detailed below.

WORKSHOP [^]		LOCATION	PROPOSED DATE
Building an advice process and writing your 1st SOAs		Melbourne	8th August 2016
A practical workshop where you will ideally be writing SOAs for your clients on the following topics: <ul style="list-style-type: none"> • Pensions • Contributions • SMSF set up Presented jointly by Kath Bowler (Licensing for Accountants) and Paul Derham (Holley Nethercote/Compact). [^] Subject to minimum numbers. Face to face training will be provided in some capital cities. If you cannot attend the face to face training a webinar equivalent will be offered.		Adelaide	9th August 2016
		Perth	10th August 2016
		Brisbane	16th August 2016
		Sydney	17th August 2016
WEBINARS		PROPOSED DATE	
Developing an advice process	Automated templates -v- word templates; Para-planning -v- in house; Who needs to be involved.	4th August 2016	
Being compliance ready	Customised compliance manual; Advice policies; Registers in place.	20th September 2016	
Understanding RM responsibilities	Monitoring and supervision; Meeting your licence obligations.	18th October 2016	
Client value propositions	What clients are you servicing (SMSF clients, all clients), What are you offering; What are you going to refer/not do.	22nd November 2016	
Pricing and invoicing	What is the cost to deliver the service; What are you going to charge your client; Charging from your accounting -v- licensing entity.	6th December 2016	
Communicating the changes with clients	What, when and how to communicate with clients.	7th February 2017	
Risk profiling and asset allocation	When you need to do this; What are your options.	7th March 2017	
Insurance advice and rollovers	Scoping your advice; How that needs to change depending on your authorisations; Working with referral partners.	5th April 2017	
Responsible Manager forum	Key issues to consider for responsible managers; Addressing your concerns.	2nd May 2017	
At the end of each webinar, Kath and Paul will allocate additional time to answer your questions on other licensing issues			

FROM **\$550** Ongoing Support Package
Including 12 Month Transition Program
PER MONTH* Minimum of 12 month commitment with a total cost of \$6,600.

OR **\$2,750** Transition Program
Stand Alone Price
PER PERSON

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