

BT Group Licensees

◀ **BT Group Licensees**

◀ **BT Select**

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The community of choice for successful wealth businesses.

BT Group Licensees partners with like-minded professionals committed to maintaining the highest standards of quality advice to achieve the best possible outcomes for their clients.

Leveraging the strength, scale and stability of the BT Financial Group, members of our community have access to a range of innovative, market leading services, either through our Australian Financial Services (AFS) licences, Magnitude and Securitor, or as part of our BT Select offering to AFS licence holders.

Magnitude

Actively engaging business owners to enhance value and drive growth.

Founded in 1999, Magnitude has a strong history of supporting successful wealth businesses in the delivery of quality financial advice.

Backed by a team of experts, we are committed to providing practices with the insights and resources for continued business success. As part of our network, you will have access to a suite of services to build on your core capabilities and a choice of business acumen tools and specialist programs specifically designed to drive the growth of your practice.

Joining Magnitude also means you can leverage the scale, strength and stability of BT Financial Group, driving greater efficiencies in your business – without compromising your autonomy.

Community

Magnitude brings together an exclusive community of like-minded professionals, defined by a willingness to share best practice insights in the pursuit of excellence.

Expertise

Our experienced practice management team work collaboratively with you to identify and implement solutions to help you build a stronger and more dynamic business.

Focus

We provide you with clarity amongst the complex, paving a clear path for you to focus on what matters most.

securitor

Leading a community of professional businesses, creating sustainable growth through active partnerships.

At Securitor, we have a proud history of partnering with advisers and accountants to achieve their full business potential. Over the years, we have created a strong and supportive community where everyone can benefit from our shared standards and access to peer learning.

Backed by a team of specialists, we provide comprehensive and innovative solutions to help you determine the vision of your business and that of your clients.

We understand every business is unique. That's why we give you the support you need to succeed and the freedom to focus on what matters most. And because your success is our success, we are with you every step of the way.

Sustainable Growth

Securitor gives you the support and guidance to facilitate sustainable practice growth. We know each business is different and provide tailored solutions and support services to meet individual needs.

Active Partnerships

Securitor is a trusted professional partner, connecting practices to innovative tools and proven strategies. We provide access to a suite of services to build your core capability and a choice of business acumen tools and specialist programs designed to drive the growth of your practice.

Community

Community is important at Securitor. Drawing from 30 years heritage, we are a like-minded group of professionals that feels more like family. We believe all of our adviser and accounting partners can benefit from our strong collaborative culture, brought to life via peer forums, master classes and community events.

Our licence

Magnitude and Securitor

Core services

- > Advice documents, tools and policies
- > Compliance services
- > Marketing resources
- > Professional development and leadership capability
- > Professional indemnity insurance
- > Research support and services
- > Software solutions
- > Technical services and support

Core services

This area covers the essential support required in order to provide quality, compliant financial services to your clients. Our core services are designed to build a strong foundation for a sustainable advice business.

Business acumen

Services from this menu are designed to provide you with the knowledge, skills and support to be a better CEO and business owner. It is incredibly important to spend the right amount of time in these areas and our support will ensure you do just that.

Business acumen

- > Business planning
- > Client value proposition
- > Investment and insurance philosophy
- > Marketing and social media strategies
- > Benchmarking
- > Peer-to-peer engagement
- > Risk management and issue resolution
- > Transitions management
- > Acquisitions and succession planning

Specialist service

- > Corporate governance
- > Investment consulting
- > Leadership development
- > Sales skilling and coaching programs
- > Strategic consulting

Specialist service

If you are looking to run a specialist program to address a specific need within your practice then this menu will allow you to select items relevant to your business. Please note that some programs will attract an additional cost.



BT Select

The community of choice for successful self-licensed businesses, supporting you to grow and protect your licence, brand and reputation.

BT Select is built on the strength and heritage of BT Financial Group. BT has supported advisers in managing their clients' wealth since 1969 and today is one of Australia's leading wealth managers.

By leveraging the scale, strength and stability of the BT brand, joining BT Select can drive greater efficiency and growth for your business – without compromising your autonomy.

Our value proposition focuses on three key pillars: **Community, Governance and Scale.**

Community

- > High quality, like-minded, successful self-licensed businesses.
- > Dedicated team of experienced professionals.
- > Providing strong insight in the unique challenges and opportunities.
- > Dedicated Advisory Council providing direction, support and guidance.

Governance

- > Comprehensive one on one support to help protect your licence including all aspects of the risk and compliance frameworks, disclosure documents, policies and procedures customised for your licence.
- > Responsible Manager training and regular communications.

Scale

- > Engagement of business relevant parties.
- > Access to Business Partner preferred terms and arrangements.
- > Creating scale benefits through BT Select and leveraging off the BT Financial Group.

Your licence

BT Select



Community membership

- > Dedicated Account Director
- > Annual RM training and best practice forum
- > Access to Annual BT Select self-licensed conference
- > Quarterly RM webinars
- > Compliance communications through Focus newsletter
- > Risk profiling tool
- > Technical support
- > Marketing and MyDesign Centre
- > Preferred BT Panorama and BT / Asgard pricing

Licence governance support

- > Core governance support offer
- > AFSL governance comprehensive review
- > AFSL health check
- > Compliance manual
- > Ad hoc governance consulting

Research support and services

- > Managed funds and product research
- > Developing your investment philosophy
- > Investment Committee participation
- > Developing your insurance philosophy

Professional development

- > Professional development day
- > Masterclass invitations
- > Online Learning Channel

Strategic consulting services


- > Strategy choices program

Transition support

- > Transition support – dedicated Practice Transitions Manager assisting with changing AFSL, mergers, acquisitions, etc

For more information

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Disclaimer

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