While you're looking out for your clients

We're looking out for you

In a complex and constantly changing industry, we're supporting a network of financial advisers to help more Australians take control of their finances. By investing in your success, we're providing the support, tools and insight you need to truly invest in your clients.

Our Licensee Network offers flexibility so you can choose a business model that's best suited to your goals. We're a partner that's here to guide your growth, connecting you with the right people and resources to help you build a successful and evolving business. As we help you deliver trusted advice, we're focused on how we can contribute to building a stronger financial advice profession.

Choice and flexibility

Providing flexibility so you can choose a business model that's right for you

Our network of licensees support advisers with the tools, resources and insights they need to build a successful business and deliver trusted advice to their clients. With a variety of business models available, you can choose the option that will work best for you.

Choose your business model, community and advice network

With almost 1,000 advisers, we have one of the largest financial planning networks in Australia. We offer a range of licensee options that are designed to suit different adviser needs – giving you the flexibility to choose a model that will support you in delivering quality financial advice to your clients.

You can adopt the MLC brand, co-brand, leverage one of our licensee brands, or use your own brand to build your business, your way.

Whichever option you choose, our network provides you with the opportunity to connect, learn and collaborate with like-minded professionals.

Navigating compliance

Helping you navigate the complex regulatory landscape

In an evolving industry, we're helping advisers navigate the latest compliance and regulatory changes. We'll keep you up to date with new information and equip you with the insights you need to understand and meet your compliance requirements – so you can stay focused on your business and meeting the needs of your clients.

A comprehensive compliance program that supports you

As part of our licensee network you'll have access to our new advice framework, advice guidelines and educational resources that will help you navigate the regulatory environment. Our aim is to help you understand your compliance obligations and protect both your business and your clients.

We've automated key compliance and monitoring tasks within XPLAN to streamline the provision of advice. Our dedicated state-based specialists are available for compliance coaching and auditing. They also provide regular training and workshops to help keep you and your team up to date.

Future of advice

Investing in advisers and the future of advice

We're invested in your future and in helping you achieve your business goals.

We're also looking at the bigger picture – considering how we can contribute to building a better financial advice profession. One that's focused on getting more effective outcomes for you and your clients. With our support, we believe our advisers can lead the way to better client experiences and more advice for more Australians.

Training and education designed to shape the industry

We support our advisers with the tools, training and resources needed to succeed in a changing industry. We work with leading institutions, such as Stanford University, to deliver programs that promote sustainable growth.

Through our Professional Development Days, Licensee Conferences and National Congress, you'll have the opportunity to connect with like-minded business owners, while gaining insights that will help you deliver the best outcomes for your clients and your business.

By addressing the challenges facing the broader advice community, we're developing solutions that can support your business, your clients, your local community, and the future of our profession.

WHILE YOU'RE LOOKING OUT FOR YOUR CLIENTS
We're looking out for you

DEDICATED SUPPORT

Delivering tailored support to help your business grow

We're proactive about helping you grow your business. With a dedicated business consultant and access to a range of frameworks and resources, we're committed to your success.

Whether you're looking to acquire new clients, diversify your business, buy or sell a business, or plan for succession, we'll work to help you to achieve your goals.

Positioning your business to grow

Our Practice Development Managers will work with you to identify your most important business and lifestyle goals. They'll take time to learn about your clients too, so you can evolve a business that better supports them to plan for tomorrow, while continuing to live the life they're enjoying today.

We also have dedicated strategic consultants and coaching teams who can work with you to create a vision for the future of your business. They'll help you identify resources, processes and strategic partnerships to deliver real value as part of an effective business model. If your business is transitioning, they'll help you to find the right partner to suit your business needs.

RESEARCH AND TECHNICAL

Sharing quality insights that lead to better advice

Strong and reliable market insights will help put you in a position to offer trusted financial advice to your clients. It's why we invest in a team of internal specialists who work closely with our advisers to provide up to date information about the market and investment trends.

Access one of the largest in-house research teams in the industry

ThreeSixty Research provides expert insight into a wide range of asset classes, investment models and managed funds.

They deliver approved investment lists, client education papers, performance reports and product reviews, investment research and portfolio construction options.

Our technical services team gives you the legislative and technical support you need to construct complex strategies for your clients. Access their in-depth industry knowledge on a range of issues including superannuation, estate planning, aged care and business succession. In addition our team provides you with online interactive workshops, adviser to client strategies and a dedicated technical hotline.

TOOLS AND RESOURCES

Building a platform of tools and resources to make your business more efficient

When you join the MLC Licensee Network, you'll gain access to a range of planning tools and resources specifically designed to help your business run efficiently.

Our wealth management approach includes hands-on consulting teams, digital payment portals and a tailored XPLAN experience to help you deliver quality advice to your clients.

A suite of wealth management tools

Our dedicated consulting team will make your transition into our Licensee Network smooth and simple. Once you're set up, they're on hand to offer support as you grow.

From basic functionality through to full business management and client engagement tools, our tailored XPLAN advice framework provides the platform you need to deliver quality advice to your clients. Our 24/7 digital payment tools make it easy to manage your cash flow. Our secure licensee website gives you access to a range of systems, tools, insights and resources to make your business operations as effective as they can be.

STRONG HERITAGE

Delivering the latest expertise, backed by more than 130 years of experience

MLC is built on a strong heritage of financial expertise and in-depth support. With more than 130 years of experience we're now looking towards the future – to building a more progressive advice industry for all Australians.

We're a market leader in wealth management

We have a long history of supporting advisers and their clients. We are one of the largest retail superannuation providers with over $77bn in total assets.*

With more than 3,000 employees, strong financial insights and access to a broad range of financial tools, we'll continue to support your business, your clients and our evolving profession.

WE'RE HERE TO HELP

As a valued MLC Licensee Network adviser, you're never alone. If you have any questions or would like further support, please speak to your dedicated Practice Development Manager.

*APRA Annual Fund-level Superannuation Statistics report as at June 2017

working with nab

A144971-0918