map my plan for advisers

online advice for clients, creating new opportunities for you

30 day
no obligation
free trial

Provide clients
with a
'living' plan

Enable prospects to
start their financial
planning journey

Quick and easy
set up, customised
with your details

Scale your
business to reach
more clients

All this and more,
for less than
$2.50pm per client

extra 150 clients!

**Sign up for your free 30 day trial before
15 October to reach 300 clients instead of 150.**

AFA CONFERENCE SPECIAL

Explore how you can easily set up Map My Plan for Advisers for your practice

mapmyplan.com.au/afa

Map My Plan Pty Ltd AFSL 485665

map my plan for advisers

online financial planning for your clients

map my plan for advisers

Wouldn't it be great to be able to provide your clients and prospects with a living financial plan – without the heavy lifting? How about being able to engage them in a manner where they actually start and build the planning process themselves, enabling you to discuss strategy and advice in an engaging way?

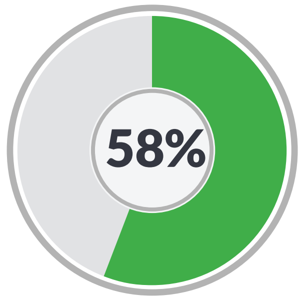
That's what Map My Plan can deliver for your clients and practice. The platform makes it easy for your clients to build a financial plan online, and gives you access to valuable data that helps you provide proactive, real-time advice. This is your platform for growth: customised with your brand, it helps you automate elements of the advice process, scale your business and reach more clients while giving you more time to build higher value, long-term client relationships.

When your clients have a financial plan they believe in, and when they feel in control of their financial future, they'll make sound financial decisions – with your guidance.

built by advisers, for advisers

Australians are already using online tools to manage their money. Map My Plan bridges the gap between adviser and client, giving every Australian the opportunity to take control of their financial future and ensuring they receive professional support when they need it most.

58% of Australians have said they would use online tools to develop their financial plan – yet just 19% use a professional planner[1]



Online financial plan

This is your client-facing portal – co-branded with your logo, and with personalised automated email communication from you to your clients.

The plan itself is self-directed, empowering clients to experiment with scenarios and online tools. But Map My Plan always prompts them to seek your advice when they need it – making sure you are always top of mind. We leave the advice, and the implementation of recommendations, to you.

Easy to set up, simple to use

Map My Plan was designed with your clients in mind. It's intuitive to use, and makes it easy to enter and understand the information they need to build a realistic financial plan.

You can be up and running with Map My Plan for Advisers in just 5 minutes. Upload a CSV file with client data and your logo, and it's ready to go.

Improve client engagement

Provide valuable services to your clients 24/7 – with minimal effort. Our automated emails, including monthly tips and education articles, help your clients stay on track with their financial goals, and keep them engaged with their plan and with you as their adviser.

They can update their plan whenever their situation changes, and print off a Statement of Advice whenever they need to. And for prospective clients, Map My Plan makes it easy for them to gather the data they need before your first meeting – so you can focus on value-adding strategic advice.

Grow your business

This valuable engagement tool helps you increase the size and quality of your pipeline, identify additional advice opportunities, and retain more clients through valuable strategic advice.

As you grow your business, you need a platform that can grow with you - and service more clients without needing an army of staff.

With your co-branded Map My Plan for Advisers, you can add as many advisers as you like, at no extra charge. Fees are client based starting at $2.50pm per client.

Unique data and insights

In just a few clicks, via the Adviser Portal, you can understand what services and solutions an individual client needs.

Filter clients by age, income, debt, super, home ownership etc as well as what goals your clients focused on.

View individual dashboards and run custom reports that identify needs of individual clients, enabling you to proactively contact them at the time they need help.

Secure and compliant

We hold our own license. So you can elect to have the online advice covered by Map My Plan's AFSL, or your own - the choice is yours. The clients are yours, we guarantee to never sell or promote financial products or other firms.

Our systems handle and store information in accordance with privacy laws and other legislation, so you can be confident your client data is safe.

We'll also take care of all tech updates and legislative changes for you. You can seamlessly integrate with your CRM and even customise the platform further for your practice.

[1]Financial Fitness of Working Australians, November 2016.

get started today with your free 30 day trial

Try Map My Plan for Advisers and see what it can do for your clients and your business. With our 30 day free trial you can get started without any credit card details or ongoing commitment. At the end of the trial there is no obligation to continue - the choice is yours.

We offer a range of affordable adviser packages to build your co-branded platform. You receive a co-branded platform, access to the adviser portal (where you can view client details and run reports) and no limit on the number of advisers using the platform. All this from as little as $500pm, which also includes your first 150 clients.

extra 150 clients!

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to get started visit:

mapmyplan.com.au/afa

Giving back through the AFA

Our goal is to help improve the financial fitness of every Australian household. That's why Map My Plan will contribute 10% of annual revenue from AFA members who sign up to Map My Plan for Advisers to the AFA Community Financial Literacy Programs. As an AFA member, you are the first advisers to be offered access to Map My Plan for Advisers.

Let's work together to improve the financial fitness of every Australian

map my plan for advisers

online financial planning for your clients

get in touch:

info@mapmyplan.com.au

FINTECH BUSINESS AWARDS 2017 WINNER FINANCIAL ADVICE INNOVATOR OF THE YEAR

ifa EXCELLENCE AWARDS WINNER 2017 INNOVATOR OF THE YEAR (COMPANY)