



**VSource**

**VSource is driven to help  
Financial Advisers spend more  
time with their clients**

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**Have things done the way you want them done**

We operate as your back office

**Know exactly how much it will cost upfront**

We charge a fixed fee per task,  
per client wherever possible

# Increase your capacity, gain more control.

- Create more time for Advisers to spend with clients
- Manage variable workloads during busy and quiet periods by having access to unlimited administration resources
- Free up capacity for you and your staff to work on 'high value' tasks
- Control cash flow by reducing fixed costs
- Control time by reducing management responsibilities
- Grow your business without having to increase your staff numbers or overhead costs

## Compare Your Options

In a world of shrinking margins, outsourcing offers the opportunity to increase capacity without increasing fixed costs. What is the right mix for your business? These are some key areas of consideration for our clients:

	Insource	Outsource
<b>MANAGEMENT TIME</b>	Recruitment, training and supervision time required.	No time required to manage staff.
<b>COSTS</b>	Fixed wages, infrastructure and on-costs.	Pay only for the hours of productive work done with no overheads.
<b>PRODUCTIVITY</b>	Staff are not productive 100% of the time. You pay whether they are working or not.	100% - only pay when work is being done.
<b>HIGH VALUE VS LOW VALUE TASKS</b>	In-house staff do all administration work. Low value tasks are the most time consuming.	In-house staff focus on high-value functions — adviser support, client service, marketing.
<b>TIME SPENT WITH CLIENTS</b>	Advisers spend less time with clients.	Advisers spend more time with clients.

# Who We Are

## VSource is a complete virtual back office for Financial Advice Practices

Our company was established with the specific purpose of providing Financial Advisers and their practices with “pay as you grow” virtual resources in the form of onshore, industry experienced administrative staff.

## How your practice benefits from working with VSource



### ONSHORE SERVICE

Australian owned and operated. Our highly experienced staff are all located within Australia.



### GAIN MORE CONTROL

We do work the way you want it done. Our efficient team is completely accountable to you.



### EXPERIENCED TEAM

Our Australian team are productive, reliable and have loads of industry experience.



### SAVE MONEY

Pay as you grow, fixed costs become variable costs.



### SAVE TIME

Have more time to spend with your clients.



### MAKE MONEY

Today's new business is tomorrow's ongoing revenue.

# Our Services

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## Pre-SOA

- Data entry of fact finds into CRM
  - Collection of fund/policy information
  - Insurance and super/investment schedules
  - Risk research
  - Fund performance comparisons
  - Fee comparisons
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## SOA

- Paraplanning
  - SOA Production
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## Implementing Advice

- Obtain outstanding requirements
  - Follow up underwriting, clients, relevant healthcare personnel, super funds
  - Completion confirmation
  - Cancellations/closure of existing policies and super funds where required
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## Ongoing Client Administration

- Compliance
    - Fee Disclosure Statements
    - Ongoing Service Agreements
  - Revenue Reconciliation
  - Review Letters
  - Annual Review Reports
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## Value-add

- Life Company Premium Increase Assessments
    - Policy info, risk research, comfort letters
  - Marketing campaigns
  - Issue company newsletters
  - Database opportunity reporting
  - Database analysis and reporting
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VSource can also provide customised administration services that are unique to your practice.



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