



# MORE OPTIONS FOR ADVISERS

WITH AUSTRALIAN ADVISORY



AUSTRALIAN  
ADVISORY

# Background

Our company philosophy is that every Australian has a right to quality advice. We promote:

- Quality advice *free of conflict*
- The fundamentals of advice
- The right advice provided by a quality Adviser

The financial advice industry is undergoing enormous change and many Advisers are facing an uncertain future. With increased compliance obligations, extensive education requirements, increased PI costs and changing revenue structures, it is arguably the most difficult environment our industry has ever faced.

Australian Advisory was established in 2017 by industry veterans thinking outside the box. **Wanting to be part of the solution to retain quality Advisers across the country**, Australian Advisory decided to face these industry challenges head on and create a new business to proactively support Advisers by offering new and innovative pathways with our four options allowing you to stay, sell, partner or move.

**Stay** in the industry or  
**Sell** your book or  
**Partner** with us or  
**Move** to a general advice model

# Stay in the industry

There are a myriad of pressures facing Advisers today. It has never been more demanding for Advisers to service clients and to operate a profitable business looking to transition.

For those Advisers committed to staying in the industry, Australian Advisory can leverage the combined efforts, resources and brains-trust of our Advisers to deliver a sustainable and supportive business model.

By joining our group, you'll have options to reduce your fees, while continuing to service your clients.





# Sell your book

For a competitive price and a smooth transition, our attractive buyout options are worth considering for those who are ready to retire or leave the industry.

As a core value, Australian Advisory is focused on offering every client quality advice. The big difference between Australian Advisory and many other alternatives in the market, is your clients are not being transferred to an institutional group but instead, being looked after by a boutique group.

We want to maintain your ongoing legacy and make sure your clients have a seamless experience through the transition.





# Partner with us

For zero costs, and an income stream, join our partnership model. We bear the costs of your business, and you receive an income.

This model is ideal for those who want to continue having a relationship with their clients but without having to carry the increased costs, compliance requirements and liability for the advice.

Under this model, Advisers can de-register and provide relationship support to their clients, while an assigned Australian Advisory Financial Adviser bears the responsibility of the client's advice going forward.



# Move to a general advice model

Similar to our stay model, another option is to move to offer your clients general advice rather than offering advice that takes personal circumstance into account.

This allows you to stay in the industry, without the burden and liability of offering personal advice.



# Learn more about **your options**



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