

# YOUR TEAM

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## OPERATIONS TEAM (TRANSITIONS/COMMISSIONS)

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## GENERAL AFFINIA CONTACTS

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[www.affinia.com.au](http://www.affinia.com.au)

### *Melbourne Office*

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Melbourne VIC 3000

### *Perth Office*

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Level 1  
5 Mill Street  
Perth WA 6000

### *Brisbane Office*

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### *Useful Contacts*

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**Research & Technical enquiries**

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## ADVICE COACHING & OPERATIONS

*Jonathon Nguyen*

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### **NATIONAL MANAGER**

The Advice Coaching & Operations Team is responsible for two important functions; licensee operational support and advice support. Operational support includes help desk assistance with administration and commission enquiries, management of the ASIC register, execution of legal documents and contracts and assistance in the transferring of revenue from product manufacturers. Beryl and Gemma comprise our very capable operations function.

Prudence and Austin oversee our Advice Coaching function which relates to our Affinia pre-vet service, acquisition due diligence and advice training.

Jonathon is your key contact when you are looking to acquire a new business or when you are looking to sell. We have a market leading funding arrangement in place with Macquarie Bank for both business purchases and personal debt arrangements.

### **Service Proposition Accountabilities:**

Synergy | Determination | Precision

### **Core Functions:**

- Facilitation of our Affinia Acquisition & Due Diligence Programme
- Advice Coaching (Pre-Vet) & Training
- Management of the ASIC register, document execution and revenue transfers
- Delivery of the Affinia help desk adviser hub for all administration/commission enquiries

## BUSINESS COACHING TEAM

*Michael Lawes*

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### **NATIONAL MANAGER**

Michael, Danielle, Rachel and Anthony are charged with implementing the Affinia Business Coaching Program. A key deliverable is providing you with up to date market intelligence, industry leading productivity and practice management solutions and support the Professional Standards team in the implementation of the Affinia remediation program.

### **Service Proposition Accountabilities:**

Precision | Determination

### **Core Functions:**

- Implementation of the Affinia Business Coaching Strategy
- Delivery of the compliance remediation process post audit for all Affinia ARs
- Productivity activities to ensure Affinia advisers are the most productive in the market
- Provide advisers with up to date market intelligence and product news.

## LICENSEE OPERATIONS

Beryl and Gemma and the Affinia Commissions team are responsible for the management and oversight of the core licensee operations. This includes: commissions management, transition of AR's and CAR's on and off the Affinia License.

### **Service Proposition Accountabilities:**

Synergy | Precision

### **Core Functions:**

- Oversight of commission payments and invoicing solution
- Standalone operation of CommPay
- On boarding and off boarding of Affinia advisers, including new advisers to your business
- Administration and maintenance of the ASIC register
- Delivery of the Affinia help desk adviser hub for all administration/commission enquiries
- Management of the external manufacture relationships including Life Insurers, Fund Managers and Platforms.

## ADVICE & RESEARCH TEAM

*Sam Rubin*

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### **NATIONAL MANAGER**

Sam, Vanissa and Cathy are responsible for the delivery of advice solutions and templates, the Affinia Academy training package, APL's and the guidelines available on the Affinia website. The Advice and Research team also deliver our due diligence programs for new Corporates and ARs into the Affinia family.

### **Service Proposition Accountabilities:**

Synergy | Determination

### **Core Functions:**

- Investment research including management of the Mercer & Bell Potter relationships
- Maintain the Risk, Investment and Technology APL's
- Chair of Product Selection Committee
- Advice Coaching and Technical services
- Maintaining of the Affinia advice and guidelines available on the Affinia website
- Affinia Training and development programs – Affinia Advice master classes.

## PROFESSIONAL STANDARDS TEAM

*Wayne Hughes*

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### **NATIONAL MANAGER**

Wayne, Jeremy (Grasnick), Riley, Clayton and Jeremy (Hopton) are responsible for assisting Affinia meet its obligations as the Licensee. This in turn assists you to meet your obligations as a Representative in managing the risks of providing financial services.

### **Service Proposition Accountabilities:**

Synergy | Precision

### **Core Functions:**

- Monitoring and supervision obligations
- Advice training
- Product Selection Committee representation
- Compliance Committee and Board reporting
- Breach and Incident assessment and management
- Manage communications with the Regulator
- Contracts and Agreements
- Maintaining and updating of guidelines.

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## ADVISER COUNCIL MEMBERS

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