

YOUR TEAM

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LICENSEE SUPPORT OFFICER

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ADVICE & RESEARCH TEAM

Sam, Vanessa, Cathy and Riley are responsible for the delivery of advice solutions and templates, the Affinia Academy training package, APLs and the guidelines available on the Affinia website.

Core Functions:

- Investment research including management of the Mercer & Lonsec relationships
- Maintain the Risk, Investment and Technology APL's
- Chair of Product Selection Committee
- Advice Training and Technical services
- Maintain the Affinia Advice and Guidelines available on the Affinia website
- Affinia Training programs

Sam Rubin

NATIONAL MANAGER – ADVICE & RESEARCH

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TRAINING MANAGER

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Riley Abbott

**ADVICE ADVOCACY TEAM LEADER
(SECONDMENT)**

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BUSINESS COACHING TEAM

Michael, Laura, Rachel and Karl 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.

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.

Michael Lawes

NATIONAL MANAGER – BUSINESS COACHING

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BUSINESS CONSULTANT – VIC/TAS

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ADVICE COACHING & LICENSEE OPERATIONS

The Advice Coaching & Operations Teams are responsible for two important functions; licensee operational support and advice support. Operational support includes management and oversight of the core licensee operations with administration enquiries, management of the ASIC register, execution of legal documents and contracts and assistance in the transferring of revenue from product manufacturers. Advice support 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.

Jonathon Nguyen

NATIONAL MANAGER – ADVICE COACHING & OPERATIONS

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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

Austin Adaragga

ADVICE COACH

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OPERATIONS CONSULTANT

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Beryl Loli

OPERATIONS MANAGER

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PROFESSIONAL STANDARDS TEAM

Wayne, Jeremy and Clayton 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.

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.

Wayne Hughes

NATIONAL MANAGER – PROFESSIONAL STANDARDS

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PROFESSIONAL STANDARDS OFFICER

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PROFESSIONAL STANDARDS MANAGER

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COMMISSIONS TEAM

Andrew, Matthew and Hiroka are responsible for the management and timely payment of all adviser remuneration. This includes commissions, advice fees and client fee invoicing.

Core Functions:

- Oversight/Reconciliation of supplier payments and adviser remuneration
- Standalone operation of CommPay and Xfinnia (XPlan)
- Mapping of New Business and Ongoing revenue types
- Delivery of remuneration/revenue enquiries
- Delivery of business and adviser reporting
- Debt management
- Management of Dealership fees along with industry and regulatory fees

Andrew Vlatko

COMMISSIONS MANAGER

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