

# YOUR TEAM

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## OPERATIONS TEAM (TRANSITIONS/COMMISSIONS)

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## GENERAL AFFINIA CONTACTS

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### *Perth Office*

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### *Brisbane Office*

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### *Useful Contacts*

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## KEY ACCOUNTS & PARTNERSHIPS

*Jonathon Nguyen*

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### **NATIONAL MANAGER**

Jonathon and Christopher are responsible for executing and achieving Affinia growth strategy, both from an organic and inorganic perspective. They are your key partners when you are looking to expand your AR base, 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 which the team are excited to talk with you about.

A key focus of the team is the facilitation and set-up of client referral programs to ensure your business is productive and you have lots of clients to give great advice too.

### **Service Proposition Accountabilities:**

Synergy | Determination

### **Core Functions:**

- Recruitment of desired CAR's to Affinia
- Develop new referral arrangements between Affinia and allied industries such as General Insurers and Accountants
- Work with existing Affinia practices to source organic growth opportunities
- Seek out strategic alliances within the TAL business
- Develop and maintain a national register of FP, Risk and Accounting Business' for sale
- Manage the Macquarie Bank relationship – Affinia exclusive funding arrangements.

## BUSINESS COACHING TEAM

*Michael Lawes*

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### **NATIONAL MANAGER**

Michael, Danielle, Warrick 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, Amelia and Jon 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, Cathy and Stewart 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, Paul, Jeremy and Chad 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, coaching and mentoring
- 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 2017

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