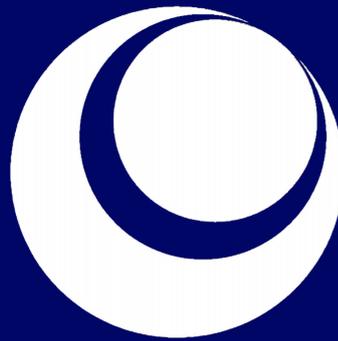


# FINANCE ADVICE GROUP



Mortgage, Loan & Insurance Network

## Network Guide

# introduction

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## WHAT IS A MORTGAGE NETWORK?

A mortgage and insurance network supports mortgage advisors by providing essential tools, compliance services, and access to lenders. It helps advisors operate efficiently, stay compliant, and benefit from a collaborative community, allowing them to better serve clients and grow their business.

## INTRODUCING FINANCE ADVICE GROUP.

Welcome to our Network, Finance Advice Group. We focus on supporting our Advisors and maintaining a positive relationship throughout their journey with us. We are a group that aims to simplify the Mortgage process for both brokers and clients.

## WHY ARE WE DIFFERENT?

Our free CRM system ensures efficient client management, while our dedicated compliance team conducts thorough file checks to maintain the highest standards. We strive for teamwork and foster positive employee interactions, creating an environment where everyone can thrive. With specialized helpdesks for any queries, we make the submission process as smooth as possible for our advisors.

# our objectives

and how we achieve them

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## Supporting our Brokers Development

*We help to support our brokers development by hosting weekly webinars and company events. We also have a training and development team who are able to assist our Advisors and Firms.*



## Exceptional Customer Service

*We are able to deliver exceptional customer service by always having a team to contact for your queries, from compliance to packaging, there is a team for you to call.*



## Smooth and Stress-free Submission

*We aim to make the process of Advising on Mortgages and Insurances as simple as possible. By having accessible resources for the information and guidance that our brokers require, we are able to ensure they can provide accurate, high-quality advice to their clients, streamlining the entire process.*



## Promoting Positive Employee Interaction

*We enjoy hosting team-building events and other fun activities for all Firms, staff and Advisors within our Network. This helps us to foster stronger connections, enhance collaboration, and create a supportive and engaging work environment where everyone feels valued and motivated.*



# ◆ our benefits

- ◆ Free to use CRM System
- ◆ Support Helpdesks
- ◆ Weekly Webinars with BDM's
- ◆ Network Events
- ◆ Training and Development
- ◆ Franchise and AR Opportunities
- ◆ Effective Comission Processing
- ◆ Technical Assistance
- ◆ Access to our Panel of Lenders
- ◆ 2 and 4 year Protection Panel
- ◆ Compliance File Checks
- ◆ Lead Generation
- ◆ Document Templates
- ◆ Financial Promotions Guidance

# our helpdesks



## Mortgage Helpdesk

*You can call our Mortgage Helpdesk for assistance with placement of cases and criteria queries.*



## Insurance Helpdesk

*The Insurance Helpdesk is accessible for any Advisor who may be struggling to place an Insurance case where the client may have previous medical issues, along with any other cases needing assistance.*



## Compliance Helpdesk

*Our Compliance Helpdesk is available for all compliance queries, including queries prior to submission along with any fraud concerns you may have.*



## Complaints Helpdesk

*You are able to contact our Complaints team about advice if you are to receive a complaint, as well as any other queries about our complaints procedure.*



## Marketing Helpdesk

*This helpdesk is happy to check if your financial promotions comply with financial regulations, as well as covering any other marketing queries.*



## Training & Development Helpdesk

*If you are looking for Information on Training, Professional Development or any upcoming events that may cover these, the T&D team is here to help.*

# our events

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## ROUND TABLE

Our round table events start at 9:30am and finishes at 12:30pm . We invite the Lenders and Insurers we work with and each BDM spends 15 minutes at each table. The BDM will make their way around all of the advisors tables and during the event both breakfast and lunch are included.

This event is a great opportunity to expand and share knowledge and contributes towards your continued professional development (CPD).

## TEAM BUILDING

Aside from our Quarterly Round Table events, Our network regularly hosts team-building events where Appointed Representatives (AR) and Directly Authorised (DA) firms come together for friendly competition. These events are designed to encourage collaboration and build strong relationships between the advisors and other staff in your companies.

## SEASONAL EVENTS & AWARDS

Our seasonal events include parties for Christmas along with awards for recognition for the top performances of Advisors and Firms within both Finance Advice Group Network and Club Businesses.



# contact us

to find out more

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