PROPERTY MAVENS®

Integrating Property Advice

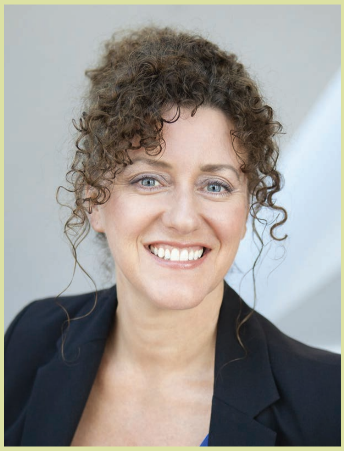
Specialist Adviser Course

propertymavens.com.au +61 3 9988 2266 www.facebook.com/PropertyMavens

Property Mavens is a leading provider of property advice services.

Our firm specialises in identifying high performing investment-grade residential properties matched to a client's individual financial goals. The vision is to assist financial services practices to extend their advice network with 'client best interest' outcomes.

The Property Mavens' team are Licensed Real Estate Agents and/or Accredited Property Investment Advisers who provide strategic advice that is comprehensive and specifically tailored for financial planning clients. These position the adviser as a lead in their engagement with their client.



"20+ year industry veteran and one of Australia's most recognised property advice firms"

Miriam Sandkuhler
Managing Director,
Property Mavens

Proud member of the REIV

ACCREDITED MEMBER REBAA BUY WITH CONFIDENCE

PIAA ACCREDITED ADVISOR

Integrating Property Advice

Traditionally, most advisers have avoided giving advice in relation to property investments. However, many advisers find that some of their clients are susceptible to the unwarranted claims of spruikers and project marketers. There is a need for advisers to be diligent in ensuring that their clients receive qualified advice from experienced property investment professionals.

With over 1 million SMSF trustees in Australia, many with a bias for property investment, advisers can ill afford to ignore property in their advice process.

This course will equip advisers with the skills and knowledge to develop a robust property investment advice services offering. It is a relational service that requires the adviser to work in cross functional teams with property investment specialists, valuers, conveyancers, lawyers and quantity surveyors. These are congruent with adviser positioning during a real estate investment engagement.

The aim of the course is to encourage the adviser to build longer and deeper client relationships based on education, empathy and trust.

Assessment

We have designed our assessment activities in line with best practice standards to help you deliver quality advice outcomes to your clients. Each subject includes a multiple choice knowledge test.

The course provides a Case Study Assignment and a series of written questions, based on the practical application of concepts learned.

Who Should Enrol?

Full Program

This program is for financial advisers, planners and accountants who wish to extend their advice offering and work with property investment specialists. It has a strong practical, experiential focus which encourages application of principles.

- The course can be tailored to meet the needs of dealer groups and institutions. Entry level property investment planning for private wealth management professionals.
- Financial planning practitioners who intend to become equity partners or business managers.

Referrer Course

It is recommended that support staff and BDMs enrol to help develop an understanding of the property investment process and its place in wealth creation strategies. The course is also ideal for client facing practice staff so they can provide information and answer initial queries.

What are the benefits?

The Integrating Property Advice Program offers the following benefits:

- Increased client acquisition opportunities by providing full service wealth creation solutions.
- Reduced risk of client attrition due to clients seeking property advice elsewhere.
- Influence clients before they make bad investment decisions.
- Increased client retention as advisers are able to meet clients' property investment management needs.
- Trusted adviser positioning and increased depth of relationship with client.

Course Outline

Code	Unit Title
This course demonstrates how advisers can integrate the expertise of property investment specialists into their practice, examines adviser positioning and works through the technical knowledge required to better guide clients on the complexities of direct property investment.	
Part 1	Free advice isn't free
Part 2	Personal and property risk
Part 3	Develop a strategy
Part 4	Engage your team of experts
Part 5	Select and Assess
Part 6	Negotiate the offer
Part 7	Portfolio review and research

PROPERTY MAVENS®

Online Learning

Studying online at your own pace gives you the flexibility to achieve a qualification whilst also fulfilling your other life commitments.

How to Enrol

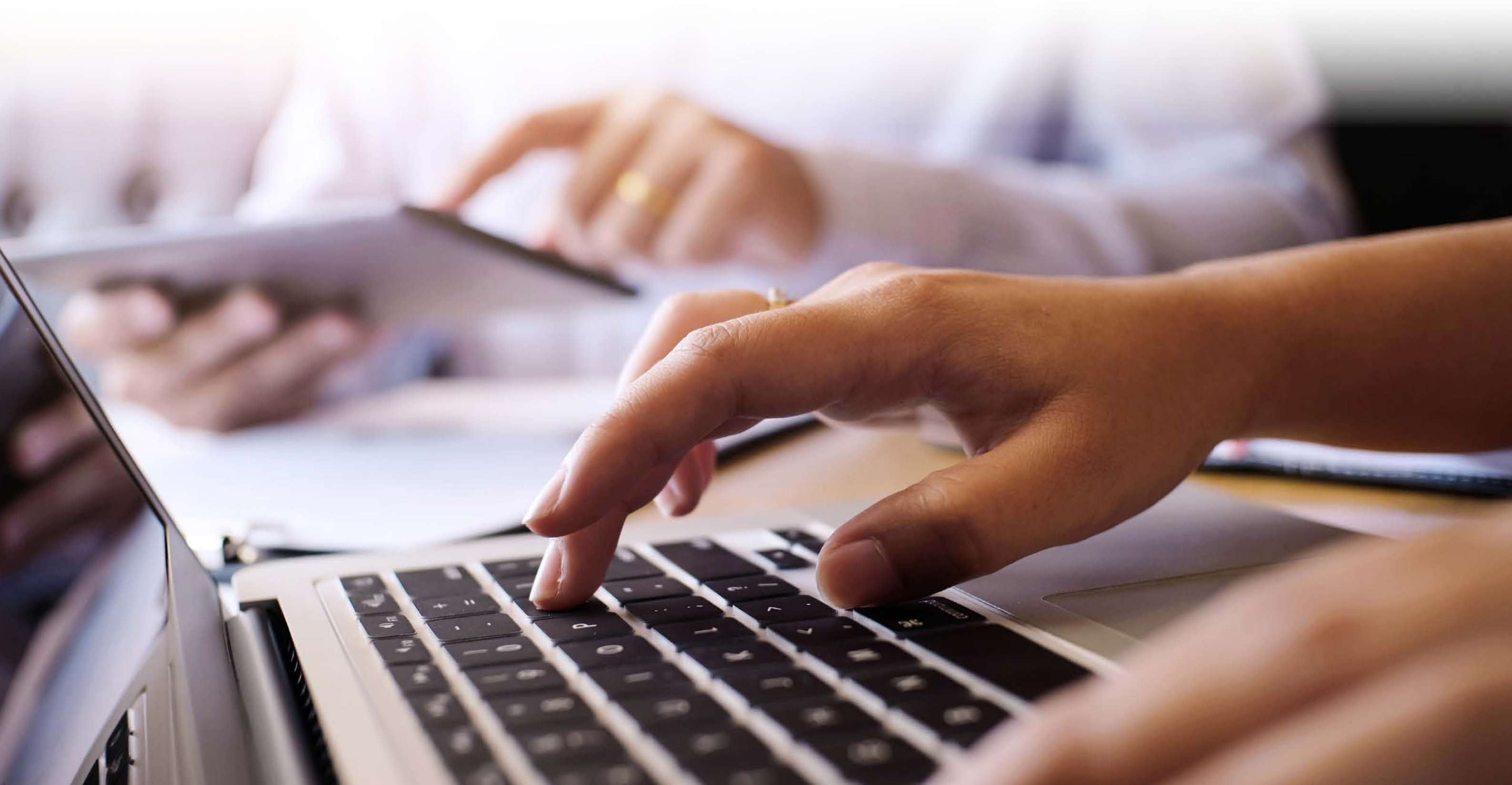
To enrol, complete the online Student Enrolment Form or scan/email a soft copy to: info@propertymavens.com.au

Student Support

To help you thrive and achieve your study goals, expert teacher support is available.

- Unlimited phone support is available Monday to Friday 9am to 5.00pm (AEST) – 03 9988 2266
- Unlimited email support, and responded to within two business days

You can get one on-one help from expert tutors via email and you are encouraged to share your work to receive feedback.



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