

# You've got your Limited Licence... so now what?

Brought to you by



## SIGN UP TODAY FOR OUR ONGOING SUPPORT PACKAGE

We have developed a formula to take the stress out of complying with the Limited Licence requirements.



### YOU WILL RECEIVE:

- Step by step guidance to making licensing work
- Insights from industry experts Kath Bowler, Paul Derham and their teams
- Flexible add ons for additional accountants
- **Plus a BONUS 12 month Transition Program**

ADVICE DOCUMENTS	RESOURCE LIBRARY	ONGOING TRAINING	MONTHLY UPDATES
<p>Our cloud based advice software solution generates your advice documents, including SOAs.</p> <p>L4A's software partner</p>	<ul style="list-style-type: none"> <li>• Updated compliance manual</li> <li>• Risk register</li> <li>• Adviser manual (including adviser tools such as fact finds)</li> <li>• Template client letters</li> </ul>	<p>Meet your ongoing RG146 requirements.</p> <p>Training will include:</p> <ul style="list-style-type: none"> <li>• Face to face workshops</li> <li>• Webinars</li> <li>• Self paced learning materials</li> </ul>	<p>Keep informed of regulatory and licensing changes through Holley Nethercote's monthly email compliance update <i>TRex</i>.</p>

FROM  
**\$550**  
PER MONTH\*

### Ongoing Support Package including 12 Month Transition Program

Price covers all services for one Responsible Manager. Reduced costs apply for additional people, depending on the number of Responsible Managers, the number of accountants providing advice and the components you select for those people.

Minimum 12 months commitment with a total cost of \$6,600. \*All prices are inclusive of GST.

**SIGN UP TODAY! Email [info@L4A.com.au](mailto:info@L4A.com.au) or Phone 1300 930 328**

[L4A.com.au](http://L4A.com.au)



# The L4A Transition Program

**BONUS 12 MONTH TRANSITION PROGRAM**

## STEP BY STEP GUIDANCE FROM LEADING INDUSTRY EXPERTS

In your first year of joining, you will receive our structured L4A Transition Program as a bonus to help you implement your Limited Licence successfully. The dates for the next intake are detailed below.

WORKSHOP <sup>^</sup>	LOCATION	PROPOSED DATE
<b>Building an advice process and writing your 1st SOAs</b>  A practical workshop where you will ideally be writing SOAs for your clients. The workshop includes role plays, examples and case studies to understand: <ul style="list-style-type: none"> <li>• When licensing advice is triggered</li> <li>• How to scope your advice</li> <li>• How to meet your best interest duty obligations</li> </ul> Presented jointly by Kath Bowler (Licensing for Accountants) and Paul Derham (Holley Nethercote/Compact). <sup>^</sup> Subject to minimum numbers. Face to face training will be provided in some capital cities. If you cannot attend the face to face training a webinar equivalent will be offered.	Perth	8th February 2017
	Adelaide	9th February 2017
	Melbourne	10th February 2017
	Brisbane	23rd February 2017
	Sydney	27th February 2017

WEBINARS <sup>^^</sup>	PROPOSED DATE	
<b>Introduction</b>	Welcome to the program; new licensee checklist; setting up your stationery; introduction to the advice process.	3rd February 2017
<b>Being compliance ready</b>	Customised compliance manual; Advice policies; Registers in place.	7th April 2017
<b>Understanding RM responsibilities</b>	Monitoring and supervision; Meeting your licence obligations.	5th May 2017
<b>Client value propositions</b>	What clients are you servicing (SMSF clients, all clients), What are you offering; What are you going to refer/not do.	2nd June 2017
<b>Pricing and invoicing</b>	What is the cost to deliver the service; What are you going to charge your client; Charging from your accounting -v- licensing entity.	21st July 2017
<b>Communicating the changes with clients</b>	What, when and how to communicate with clients.	11th August 2017
<b>Risk profiling and asset allocation</b>	When you need to do this; What are your options.	8th September 2017
<b>Insurance advice and rollovers</b>	Scoping your advice; How that needs to change depending on your authorisations; Working with referral partners.	13th October 2017
<b>Responsible Manager forum</b>	Key issues to consider for responsible managers; Addressing your concerns.	10th November 2017

At the end of each webinar, Kath and Paul will allocate additional time to answer your questions on other licensing issues

<sup>^^</sup>Webinar order subject to change

FROM **\$550** Ongoing Support Package Including 12 Month Transition Program **OR** **\$2,750** Transition Program Stand Alone Price  
 PER MONTH\* Minimum of 12 month commitment with a total cost of \$6,600. PER PERSON

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