

# finPRO

## tools for professional financial advice IFA members receive 20% discount to attend workshops

As a professional financial adviser (someone who requires or will require authorisation under applicable legislation) you need:

- **The best outcomes for your clients**
- **To protect and build your reputation** (their most valuable asset)
- **Tools** to help you create effective, compliant advice of a consistent high quality
- **Systems** that can minimise errors, eliminate business risks, save you time, and maximize your bottom line



It is with all this in mind that Simon Hassan, a fellow of the Institute of Financial Advisers and (past president), has developed financial planning tools and templates that will help New Zealand advisers make better use of Excel and Word in creating professional, compliant, effective statements of advice.

**The need** - Over many years as an adviser, Simon has looked at lots of planning tools. Dissatisfied by other advice packages and associated costs, he developed his own Excel and Word-based tools, constantly refining these over the years as tools in his practice. His vision is to 'empower' rather than 'capture' advisers. Rather than just creating a money machine the concept is mostly about equipping advisers to do their work better and more efficiently.

### **The solution - A financial advice support package**

- Whether you are a sole practitioner, or work in a small, medium or large financial advice practice ...
- Whether you provide comprehensive financial advice or advice that is limited to just one or some areas (say insurance, retirement adequacy, investments) ...

**finPRO™** makes these tools – and the wealth of knowledge behind them – available to you, helping create simple, professional, effective and compliant statements of advice.

**The opportunity** – **finPRO** is perfect for sole traders, small practices, larger advisory firms and institutions. All wishing to protect and build their brand by ensuring their advice process is robust and consistent, organisation-wide.

**Practical, hands-on training** - Whether or not you decide to purchase the **finPRO™** tools, attending a workshop is a valuable opportunity to hone your skills using powerful tools like Microsoft Excel (*Chisel to Michelangelo is as Excel to financial professional*) and Word. Usually limited to no more than 20 participants, the workshop is a hands-on full day's training that will build your financial advice skills. The small group setting helps ensure you get full value from the day. You will also use the **finPRO™** tools with a live case study, creating calculations, graphs and tables in Excel and using these in building a completed financial advice document.

After the workshop if you decide to purchase the **finPRO™** tools, you will be ready to put them to work right away in your business. You can register your attendance by going online at [www.finpro.co.nz](http://www.finpro.co.nz) and by choosing your date and venue.

A **finPRO™** workshop could be the best investment you've ever made in your business.