

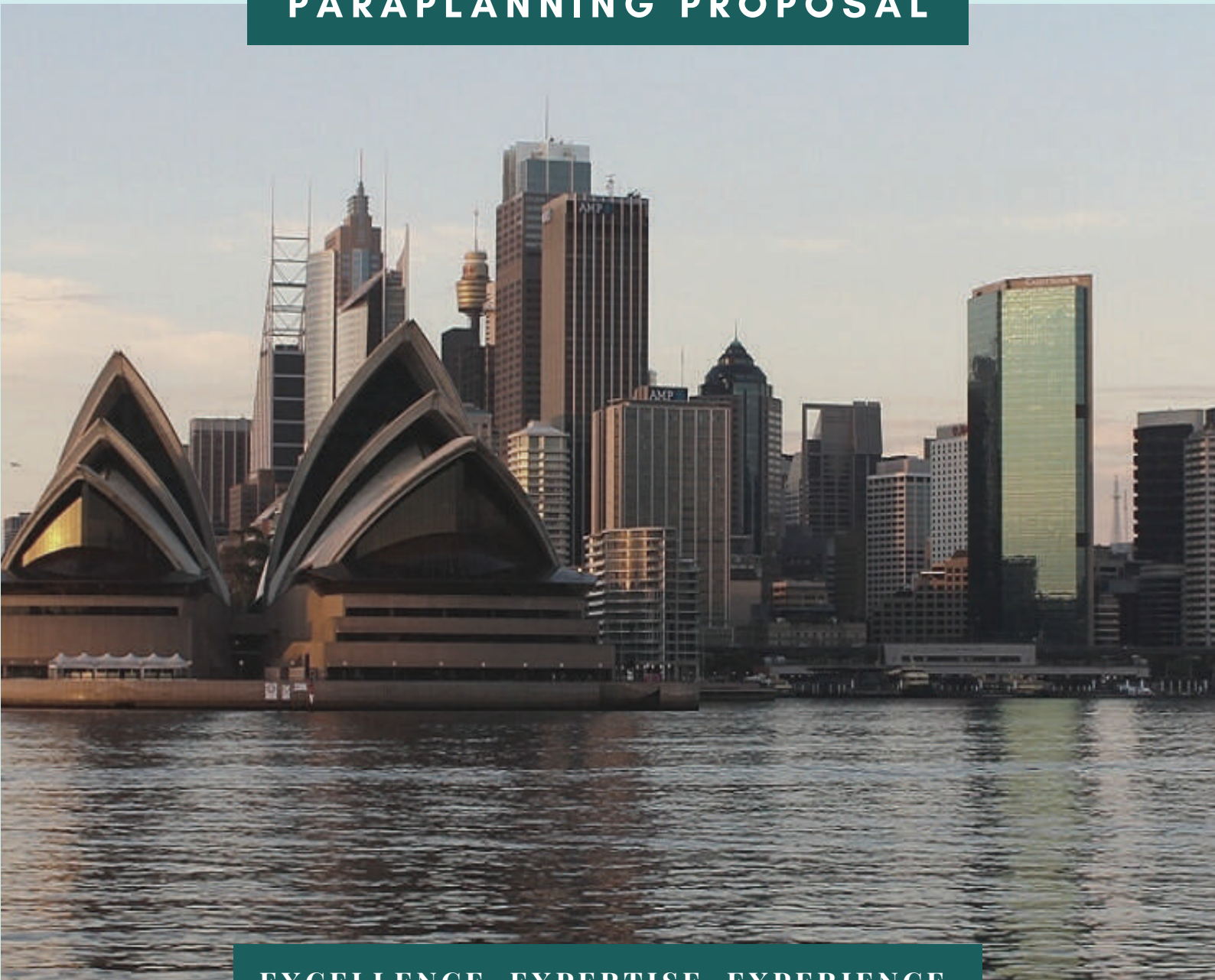
ACN 616 406 065 | ABN 79 616 406 065



# BROKERS SUPPORT GLOBAL (BSG)

(A Division of Navkar Consultancy Services Pty Ltd)

## PARAPLANNING PROPOSAL



**EXCELLENCE. EXPERTISE. EXPERIENCE.**

 [brokerssupport.com.au](https://brokerssupport.com.au)

 [tejas@brokerssupport.com.au](mailto:tejas@brokerssupport.com.au)

[kiran@brokerssupport.com.au](mailto:kiran@brokerssupport.com.au)



# MEET THE TEAM YOU WILL BE WORKING WITH



**CA CMA HITESH SHAH**

Managing Director



**CA CMA RAHUL SHAH**

President



**CA AAGAM SHAH**

Managing Director





# Why BSG



Most financial advisers do not employ professional paraplanners - by this, we mean the individuals that have chosen paraplanning as a career.

Some choose a multi-facet approach within a practice. Meaning stretching Administrative resources across a variety of roles of which some of these tasks, for example, paraplanning, are not appropriately qualified for.

Regardless of how good your administrative team and assistants are, there is no substitute for a true paraplanner. BSG provides support for the preparation of high-quality technical, legislatively up-to-date, and compliant Statements of Advice based on your business requirements.



# Why BSG



Our team of technical wizards at BSG has experience when it comes to researching and understanding the technical elements of strategies put before them. And the team prides itself on using initiative when it comes to looking beyond just the initial paraplaning request submitted.

BSG understands that not every piece of advice is comprehensive and the possibilities are limitless in terms of what BSG can produce for your business, whether you provide comprehensive, limited, or project specific advice.

Keeping abreast with legislative, technical, and compliance requirements can be challenging at times. But imagine a service that not only wrote your Statement of Advice and Review documents the way you want them written, but understood your presentation and communication style, which meant that you were getting more than just technical advice on paper.





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**We offer a comprehensive  
range of services to financial  
planning firms.**

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# How we do it?



We understand that each business is unique and has different business needs. This is why we take the time upfront to discover how you, as a business, operate and how we can best support you to achieve your outcomes while building a long-term business partnership.

BSG can manage your entire back office for you, our most popular range of outsourced office support services are listed below but this list is by no means exhaustive.





# Services





# Powerful SOA Templates

Ensure your SoA's are more than just compliance documents. Make them powerful marketing and sales tools by using the right design, structure and wording. An easy to understand SoA will communicate your advice to clients clearly and precisely and captures the value of your services and increases efficiencies by avoiding lengthy, repetitive explanations. And armed with our PowerPoint presentations you will be sure to impress.

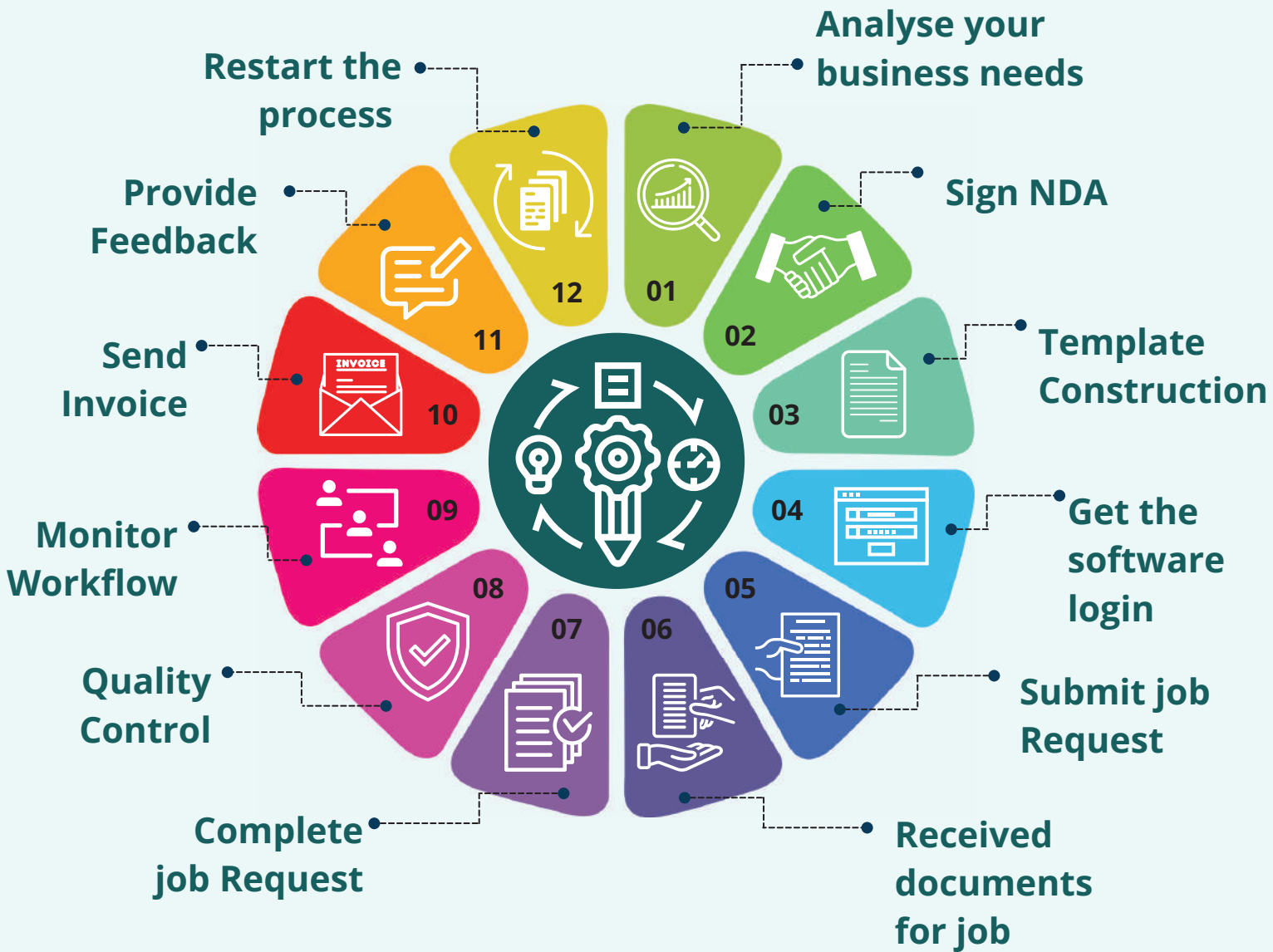
**We came up with the following design points to ensure your SoA is appealing to read and portrays the key points.**







# Our Paraplanning Process





# SoA Vetting



At BSG you can rest assured that we have a broad understanding of different licensee requirements and thus we offer a post vetting of advice service, to ensure you are meeting industry and licensee compliance requirements so that non-compliance is identified as early as possible.

## SOFTWARE AND TOOLS







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**Outsourcing your back office to  
BSG provides increased  
benefits & efficiencies to your  
business.**

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## FEES AND CHARGES

- BSG has a two-tiered offering. We have full-time equivalent fixed monthly packages as well as Pay-Per-Plan offering where each SOA has a base fee per SOA, plus a per-strategy pricing structure.
- At BSG we understand that every SOA is different, therefore depending on the complexity, we provide you with a fee to match, and this way there is no confusion around fees.
- The package fee is based upon a mix of simple and complex SOA's being requested. If a large majority of SOA's requested are complex, we will review & update pricing accordingly.





## OUR PAYMENT TERMS

Our payment terms are strictly 7 days from date of invoice.

## STANDARD TURNAROUND

Our standard delivery time for all SOA's is approximately 3 to 5 business days upon return of pre-vetting unless expressly stated otherwise

## EXPRESS TURNAROUND

We understand that in certain situations you may need your administrative tasks completed in a faster time frame than our standard delivery time. Where this is required, we will endeavor to have your tasks completed in the time frame requested (from when we have received all relevant information), one of our team will contact you to advise if this is possible.

Please take note of the Express Service Charges.

1 Day Turnaround	75% Surcharge
2 Day Turnaround	50% Surcharge



# Financial Planning Software



Financial Planning Software must be provided for every package selected above. The required amount of logins is dependent on the package selected. One login per every 10 SOA's per month is required (pro-rata).

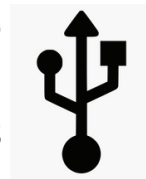




# Security Measures



Employees are allowed to enter the work area exclusively through biometric verification and access card.



USB ports are disabled at workstations and do not have external drives.



Cellular phones, Bags and Personal Articles are prohibited in the work area.



Accessing personal email accounts is strictly forbidden.



The entire work area & systems are under CCTV surveillance.



Use of the internet is restricted to work-related sites only.



All the work facilities are guarded by security guards deployed outside the work facilities at all times.



IP authentication ensures business sites of the firm are available to authorized parties



# Contact Us



**Broker Support  
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A Division of NCS  
Corp!**

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