



# **BROKERS SUPPORT GLOBAL (BSG)**

**(A Division of NCS GLOBAL)**

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# About BSG

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We are a Sydney-based firm serving Financial Advisors and Mortgage Brokers in Australia, offering comprehensive paraplanning and administrative support solutions tailored to the needs of Australian financial advisors. By automating repetitive tasks and leveraging advanced technology, we help clients streamline their operations, reduce costs, and improve efficiency. Our team of experienced professionals provides expert guidance and support, ensuring that our clients receive the highest quality service. With a focus on Australian-specific regulations and market dynamics, BSG is committed to delivering tailored solutions that help financial advisors succeed.



**Quick Turnaround  
Time**



**Cost Savings &  
Increase Efficiency**



**300+ Dedicated  
Employees**



**100+ clients  
onboarded**



# Why Choose BSG?

At BSG, we are dedicated to providing top-notch paraplanning services designed to align with the specific needs of your financial advisory practice. Our commitment to precision, compliance, and excellence sets us apart, and we strive to be a reliable partner in supporting your business. Here are some key highlights of our capabilities:



## Team Expertise:

We support over 100 financial advisers with a team of 200+ skilled financial planners, providing precise and compliant paraplanning services.



## Core Review Team:

20-30% of our staff have 5+ years of experience and form a dedicated core review team that ensures accuracy and high standards, especially for complex advice.



## Experience with Complex Advice:

We handle over 100+ SMSF and complex advice and 500+ Simple and moderate cases monthly, ensuring timely and expert preparation.



## Compliance Support:

We work closely with an Australia-based compliance consultant to ensure that all plans comply with local regulations, providing an extra layer of quality assurance and regulatory compliance.



# Our Key Strengths

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Outsourcing can **revolutionise your business by boosting efficiency and productivity**. But with so many options, it can be overwhelming to know where to begin.

At **BSG**, we are your guide to a successful outsourcing journey. We will help you prepare your business, navigate the transition, and ensure a smooth process every step of the way.



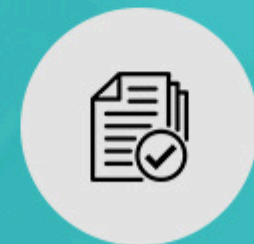
**Cost Savings:** Efficient processes and offshoring models reduce operational costs without compromising service quality.



**Continuity & Flexibility:** If one resource leaves, we ensure seamless transitions with another resource stepping in, maintaining uninterrupted service.



**Employee Training & Recruitment:** We continuously train and recruit talented paraplanners, ensuring a skilled workforce that adapts to your evolving needs.



**Compliance Assurance:** Our experienced review team rigorously checks all SOAs and advice documents to ensure adherence to compliance standards.



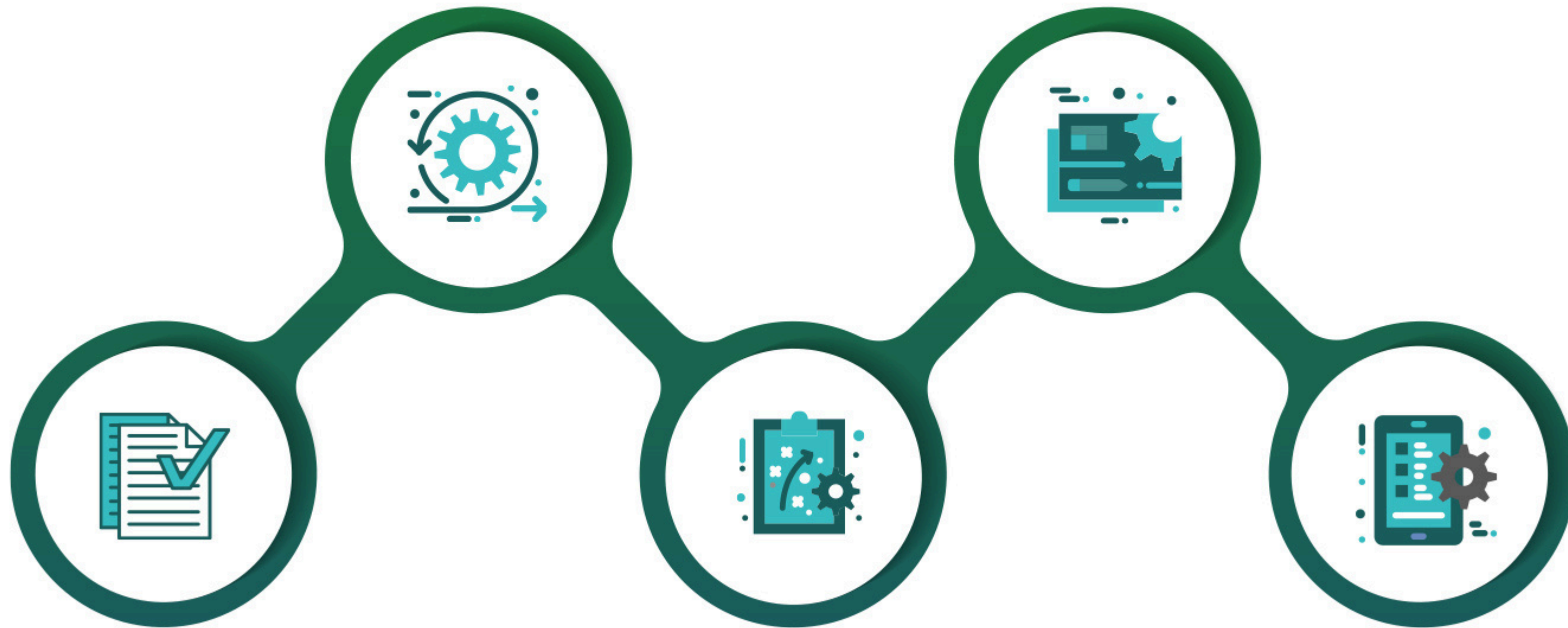
# Scope of Work

## All SoA/ RoA

(i.e. Super rollover/consolidation/rebalance, Insurance, Investment, TTR, ABP, SMSF, Annuity, Aged Care etc.)

## Associate Adviser Services

(i.e. Helping advisers to frame smart goals, strategy development, portfolio modeling, Alternative strategy, etc.)



## All Pre-SoA Tasks

(i.e. Sending TPA, Data collections, Cost Comparison, Insurance quotes, Strategy Paper, Fact Find etc,)

## All Post-SoA Tasks

(i.e. Filling up all the required forms, and Follow-up with the providers)

## Audit Services

(i.e. Audit of SoA's as per dealer group and ASIC compliances)



No matter how you store your data—whether on-site, in the cloud, or with a third-party provider—there's always a risk of sensitive information being compromised. We've implemented robust security measures to protect your data, including:

We understand that client data privacy and security is critical for any advice business

## Our Commitment

*BSG is committed to providing security to the confidentiality, integrity, and availability of all the information assets- physical or electronic, of the organization and to effectively managing the risks associated with these asset*

# Security Matters



The entire work area & systems are under CCTV surveillance.



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



The workstations are enchanted to deny access to USB portals and their accompanying magics.



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



## ISO certification

Our group's businesses have all received ISO 27001 certification. As a result, significant portions of our offices and data-handling systems meet or exceed the standards set by the world's leading information security management organizations. In order to prevent a breach of our organization's and our clients' data, we have both physical and non-physical controls.



# Partnership

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**infocus**

 **Templestone**  
Financial Services

 **Count**

**LaVista**  
LICENSEE SOLUTIONS

  
**midwinter**  
a Bravura company

 AUSTRALIAN  
ADVISORY

 **Lifespan**  
FINANCIAL PLANNING

 **CONSILIUM**  
ADVICE

**MORNINGSTAR**



# CONTACT



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