



Onboarding Process

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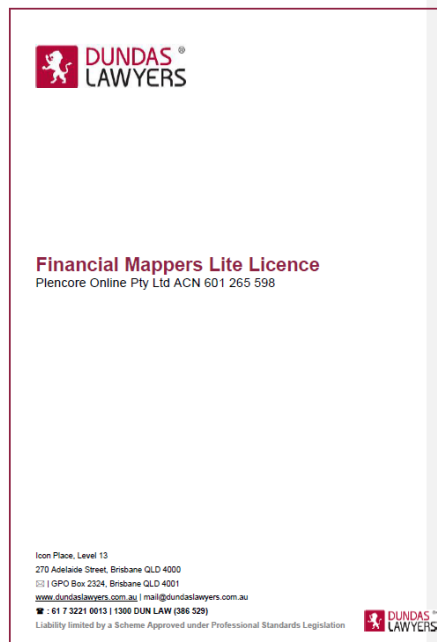
Financial Mappers LITE - Onboarding Process

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Introduction

You will need to download, complete and return the **Financial Mappers LITE License**, found in the section **Financial Mappers LITE Onboarding Documents**.



These instructions are intended for the person who has been nominated by the Company to be the **Chief FM Administrator**. After the platform is registered, additional people can be assigned this role or that of **FM Administrator**. There is no adviser or paraplanner access to the software.

There may be times, when it is appropriate for accountants and brokers to have their own URL. (Refer to Pricing Document for details). Where this is the case, ensure that Glenis Phillips is advised of the name of the Chief FM Administrator and the sub-domain name. Each person will need to be sent their own link to register their platform.

Account Creation and Customization - Detailed Steps

At the time of completing the Financial Mappers Lite License, you will have indicated the nominated Chief FM Administrator who will be responsible for onboarding the platform. In that Agreement, you will have to nominate who is responsible for payment of fees after the first 12-months. If the Company is nominated the product will be referred to as **Financial Mappers Lite** and if the Client is nominated, the product will be referred to as **Financial Mappers Lite^{PLUS}**.

1. Chief FM Administrator Nomination

The **Chief FM Admin** is the role responsible for registering and customizing your company's Financial Mappers **LITE** account. The name and email of person who will have this role should be sent to Glenis Phillips of Plencore Online Pty Ltd. glenis.phillips@financialmappers.com.au

Role Description

The **Chief FM Admin** role is the highest level of capability and has **exclusive access** to the following software usage functions:

- Registration of the company's unique sub-domain name (the first section of the permanent website URL for the company's unique Financial Mappers **LITE** account).
- Specification of Company settings where the company's logo and color scheme together are nominated along with the wording of the company's Disclosure Statement (which appears on all reports). Nominating the Default Tax and Superannuation/Pension information where the product is being used in a country other than Australia.
- Setting of the company's default rates (that is – all rates used in the model calculations).
- Creation of the company specific reports via the Report Builder. (*At least one, visible to Clients must be activated*)
- Appointment of FM admin roles and other user roles via the "Users" screen
- Appointment of additional Chief FM Admin roles via the "Users" screen. It is recommended that any additional appointments only be made for as long as required for a particular person to perform a specific task such as the creation of a report template via the Report Builder.
- Invite Clients to open their personal account. Both the FM Admin and the Chief FM Admin can access the contact details of the Lite Clients. With Financial Mappers LITE, where the company pays all client fees, you may now nominate clients to be Premium Lite Clients when they commence. With Financial Mappers Lite^{PLUS}, all clients are registered as Lite Clients and the client may choose to upgrade and pay for Premium Access.

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The **Chief FM Admin role** has access to all functions. (You can elect to have more than one Chief FM Admin role, and the roles can be changed, however it is recommended you keep the number of people with this role to a minimum)

The second administrative role is that of **FM Admin**. This person only has access to the **USER** page. There is no access to the role of **Adviser/Broker** or **Paraplanner**.

The nominated **Chief FM Admin** will be sent an email with the link (example shown below) where they can create and set up the company's Financial Mappers **LITE** account (website).

To create and customise your **Financial Mappers LITE** account the Chief FM Administrator follows these steps:

2. Account Creation

When the **Chief FM Admin** receives an email from Plencore Online Pty. Ltd. with link to the **New Financial Mappers LITE Registration**, they complete the online registration form shown here.

It is important that only the person nominated with the role of **Chief FM Admin** completes this form.

- First Name
- Last Name
- Email (Username)
- Confirm Email
- Company Name
- ABN
- Subdomain (URL Prefix)

The **subdomain name** to be used for your Financial Mappers LITE account, is shown as a prefix in front of the Financial Mappers URL in the following example for a company called "Good Advice".: <https://goodadvice.financialmappers.com.au> . This will typically be your business name, or a short version of it. Choose this carefully. It cannot be changed. Only enter the prefix for your company name. (highlighted).

- Billing Address
 - Email for Billing
 - Address Line 1
 - Address Line 2
 - Suburb
 - State and Post
 - Country
- Agree to terms

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NEW LITE REGISTRATION



FinancialMappers® LITE

Welcome to FinancialMappers Lite. To get your company started, it is important that the person who received the link to register the company is the first to register. This person will be the Administrator.

After registration, the Administrator should go to **FM Admin** to configure the company and invite users.

First Name

Last Name

Email (Username)

Confirm Email

Company Name

ABN

Sub Domain May contain letters, numbers and hyphens

i This will be part of the URL where your users access FinancialMappers.

Billing Address

Email

Address Line 1

Address Line 2

Suburb

State Postcode

Australia

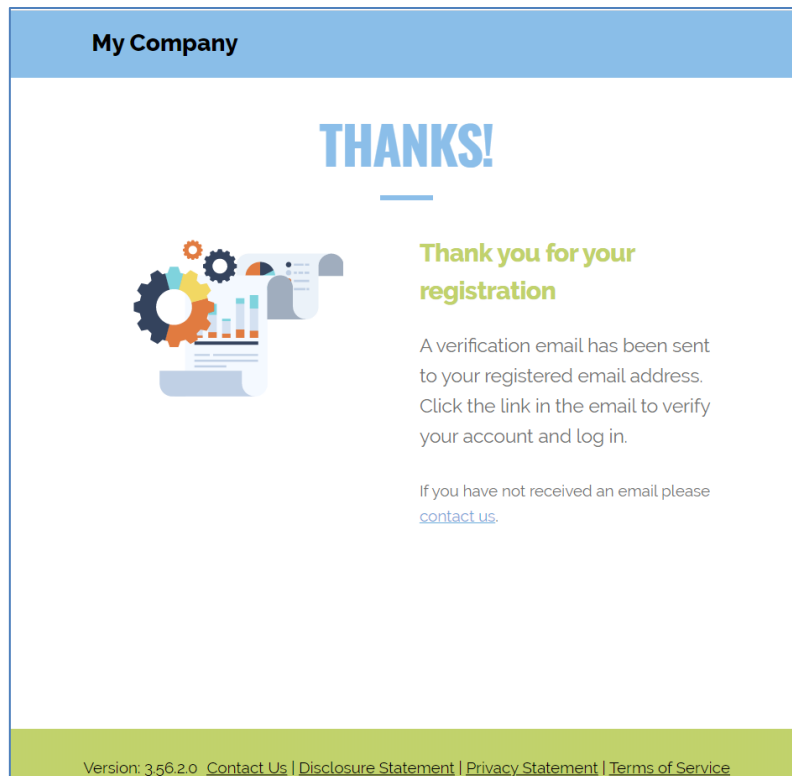
Terms

☐ I agree to the site's [terms and conditions](#)

REGISTER

When completed, the following will be displayed:

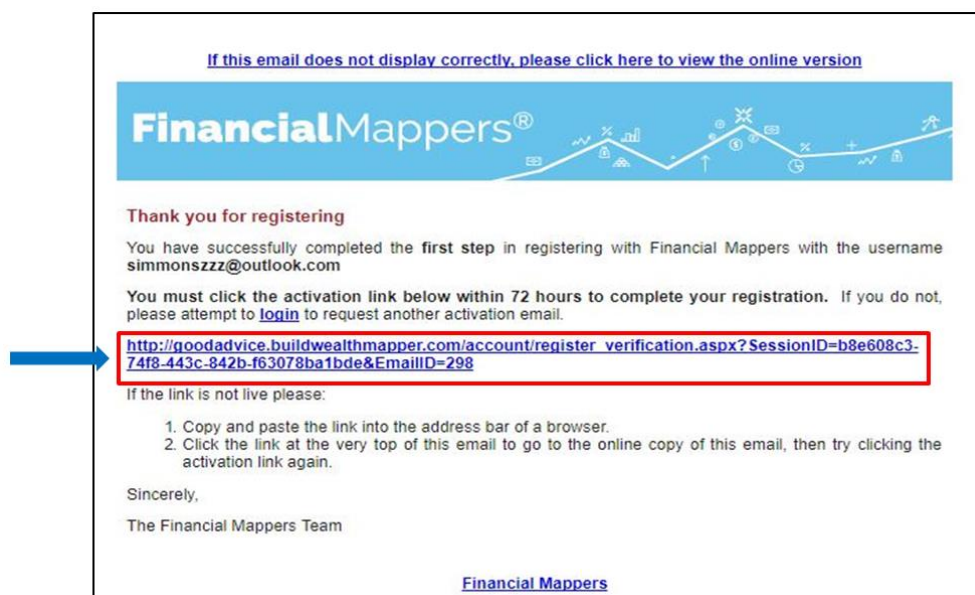
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The **Chief FM Admin** will then receive via email a link which will take them to a page to set their password.

For the example below the company is called My Company Pty Ltd, and the **Chief FM Admin** is *Simon Simmons*.

The **Chief FM Admin** then receives an email to confirm that registration has been successful. They can then then log into their newly created **Financial Mappers LITE** account using their username (email) and password.



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My Company

REGISTRATION VERIFIED
You have successfully verified your email address.
Please use the form below to set your password

Password

Confirm Password

Save Password

Make sure you bookmark your subdomain. This is where everyone logs into the software.

My Company

LOG IN


FinancialMappers®

Username (Email)
[Text Input Field]

Password [Forgot Password?](#)
[Text Input Field]

☐ I acknowledge I have read and understood the [Disclosure Statement](#) and agree to the [Terms of Service](#)

LOG IN

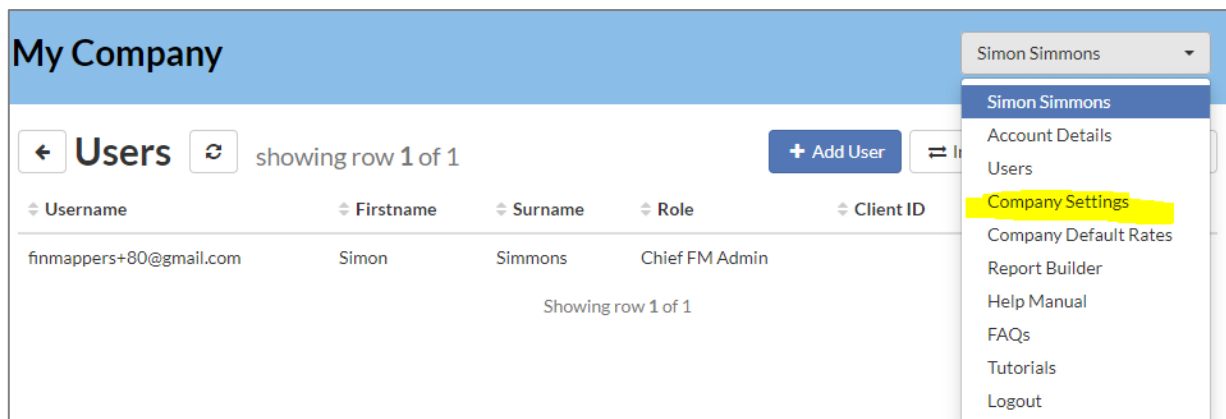
The pages opens on Users, where the Chief FM Admin, can then invite Team Members.

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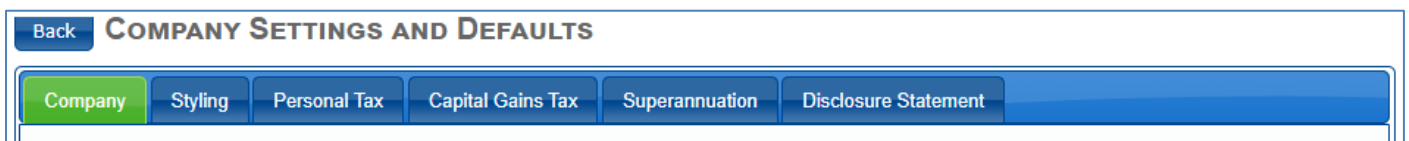
3. Account Customisation

Company Settings

The **Chief FM Admin** selects the Drop-down list under their name (in this case *Simon Simmons*) and chooses **Company Settings**. (Note that only the Chief FM Admin role has access to this option):



The Company Settings and Defaults are found under the TABS.



Company

The Company Name should be what you want to see displayed on the platform. Therefore you would not include "Pty Ltd" or similar. The login in graphic is the image the user sees on the log in page. This space can be used to promote your business.

If you your site is integrated with a CMS (Content Management System) associated select from the drop-down list. Currently, the only option is Worksorted, a CRM for financial advisers.

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COMPANY DETAILS

Company Name

Sub-domain

Login Graphic



At **Good Advice** we offer the following services:

- Financial Planning
- Accounting & Business Advisory
- General Insurance
- Aged Care Financial Advice

Phone 9999 9999

[Upload New Graphic](#)

[Remove Graphic](#)

Default CMS ▼

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Styling

The **Chief FM Admin** uploads the company's Logo for the top banner and colors for the Banner and Footer. These can be two-toned if required.

The screenshot shows the 'COMPANY SETTINGS AND DEFAULTS' page with the 'Styling' tab selected. The 'BANNER FORMATTING' section includes a checkbox for 'Include Banner Text' (unchecked) with the text '"FinancialMappers Pro in conjunction with Good Advice"'. Below this is a 'Banner Logo' field showing a logo with the text 'Good Advice Looking After Your Finances' and buttons for 'Upload New Logo' and 'Remove Logo'. The 'Primary Banner Colour' is set to '6BC3EB' and the 'Secondary Banner Colour' is also '6BC3EB' with a 'Copy Primary' button. The 'FOOTER FORMATTING' section shows the 'Primary Footer Colour' as 'B1D575' and the 'Secondary Footer Colour' as 'B1D575' with a 'Copy Primary' button. At the bottom are 'Save' and 'Cancel' buttons.

You may choose whether or not to include Financial Mappers Lite in the banner.



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Personal Tax

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[Company](#) [Styling](#) [Personal Tax](#) [Capital Gains Tax](#) [Superannuation](#) [Disclosure Statement](#)

FLAT TAX DEFAULTS

Tax Rate

Tax Free Limit

Activate Flat Tax ☒

COUNTRY SPECIFIC TAX DEFAULTS

Country

Tax Table [\[Edit\]](#)

Activate ☒

[Save](#) [Cancel](#)

The tax information defaults to the current defaults for Financial Mappers in Australia. The 2.00 % Flat Tax accounts for the Medicare Levy.

Where the software is being used in another country, select the Country and the current Year for the Tax Table. These are updated when new rates have been activated. These are the rates for New Zealand in the tax year 2021-2022

FLAT TAX ?

Tax Rate

Tax Free Limit ?

Activate Flat Tax ☐ ?

COUNTRY SPECIFIC TAX ?

Country

Tax Table

Activate ☒

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Capital Gains Tax

The Capital Gains Tax defaults to that of Australia.

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CAPITAL GAINS TAX DEFAULTS

How to Calculate Capital Gains Tax

% CG Taxed as Income ▼

Percentage of CG Taxed as Income

50.00%

The other options are No CGT as in New Zealand, or a Percentage of Capital Gain.

CAPITAL GAINS TAX ?

How to Calculate Capital Gains Tax

No CGT ▼ ?

Superannuation

Currently there is the selection of two Country Specific Superannuation/Pension types. The default is Australian Superannuation.

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FUND RULES DEFAULTS

By Country

Australian Superannuation ▼

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The second option is KiwiSaver. (Note that New Zealand Superannuation is listed in Pensions from External Sources)

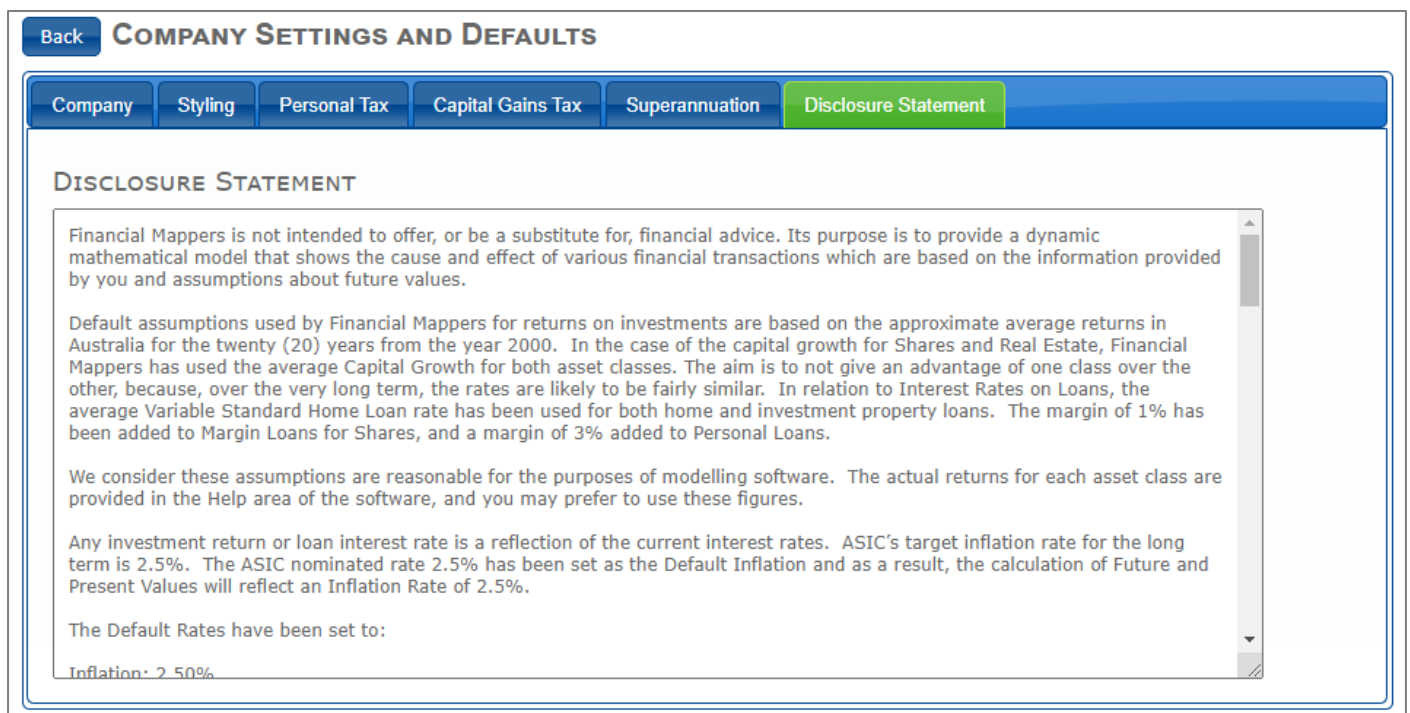


FUND TYPE

Gender

Format ☐ Universal ☒ By Country

Disclosure Statement



Back COMPANY SETTINGS AND DEFAULTS

Company Styling Personal Tax Capital Gains Tax Superannuation Disclosure Statement

DISCLOSURE STATEMENT

Financial Mappers is not intended to offer, or be a substitute for, financial advice. Its purpose is to provide a dynamic mathematical model that shows the cause and effect of various financial transactions which are based on the information provided by you and assumptions about future values.

Default assumptions used by Financial Mappers for returns on investments are based on the approximate average returns in Australia for the twenty (20) years from the year 2000. In the case of the capital growth for Shares and Real Estate, Financial Mappers has used the average Capital Growth for both asset classes. The aim is to not give an advantage of one class over the other, because, over the very long term, the rates are likely to be fairly similar. In relation to Interest Rates on Loans, the average Variable Standard Home Loan rate has been used for both home and investment property loans. The margin of 1% has been added to Margin Loans for Shares, and a margin of 3% added to Personal Loans.

We consider these assumptions are reasonable for the purposes of modelling software. The actual returns for each asset class are provided in the Help area of the software, and you may prefer to use these figures.

Any investment return or loan interest rate is a reflection of the current interest rates. ASIC's target inflation rate for the long term is 2.5%. The ASIC nominated rate 2.5% has been set as the Default Inflation and as a result, the calculation of Future and Present Values will reflect an Inflation Rate of 2.5%.

The Default Rates have been set to:

Inflation: 2.50%

The Disclosure Statement will be blank, and you must upload a suitable Disclosure Statement. The wording of the Disclosure Statement will depend on whether or not you have decided to change the Default Rates, from that of the 20-year average returns from the year 2000. Refer to the Sample Disclosure Statement in the section for Onboarding.

A template with the default disclosure statement is shown below, and this is also in a word document if you want to use this as a starting point during your trial, or for re-wording according to your business requirements if you proceed to continued usage of Financial Mappers Pro.

You can download the template here in the section [Onboarding Documents](#).

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If you intend to keep the same Default Rates as the base Financial Mappers product, then we believe that the Disclosure Statement template would be appropriate. If you choose to use a different set of Default Rates, the rationale for your choice of those rates should overwrite the Financial Mappers Disclosure Statement Template below.

Disclosure Statement Template

This software is not intended to offer, or be a substitute for, financial advice. Its purpose is to provide a dynamic mathematical model that shows the cause and effect of various financial transactions which are based on the information provided by you and assumptions about future values.

Default assumptions used for returns on investments are based on the approximate average returns in Australia for the twenty (20) years from the year 2000. In the case of the capital growth for Shares and Real Estate, the software has used the average Capital Growth for both asset classes. The aim is to not give an advantage of one class over the other, because over the very long term, the rates are likely to be fairly similar. In relation to Interest Rates on Loans, the average Variable Standard Home Loan rate has been used for both home and investment property loans. A margin of 1% has been added to Margin Loans for Shares, and a margin of 3% added to Personal Loans. Gross Rent is increased at the rate of Inflation. Actual Rents may not rise in value at the same rate as Inflation.

Please ensure the information that you provide is complete and accurate, otherwise, the projections may not be accurate. Before acting on the information consider the appropriateness of it having regard to your objectives, financial situation, and needs.

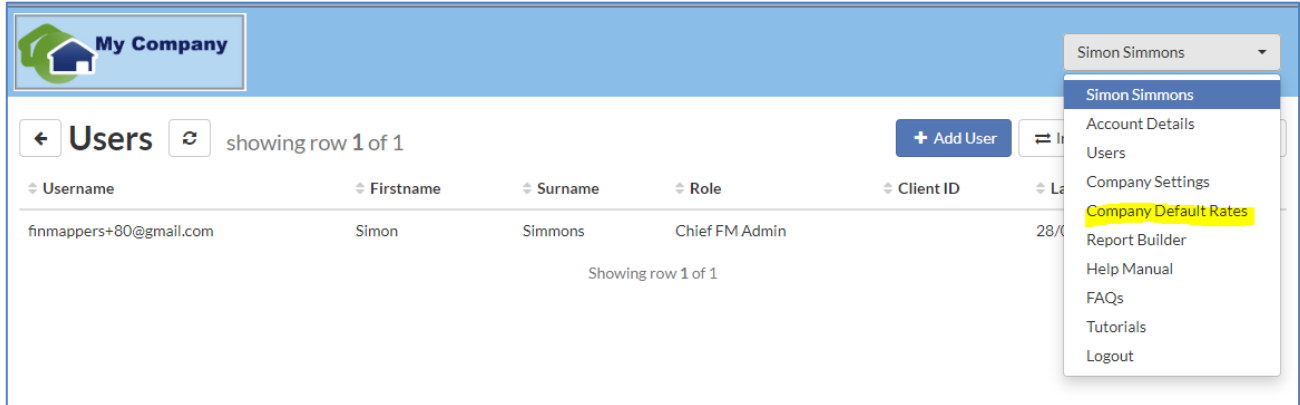
All assumptions made and forecasts produced using this software are based on past performance. Past performance is not a reliable indicator of future performance.

You should not rely solely on this software for the purpose of making a decision in relation to any financial product and you should consider obtaining advice from a financial services licensee before making any financial decision.

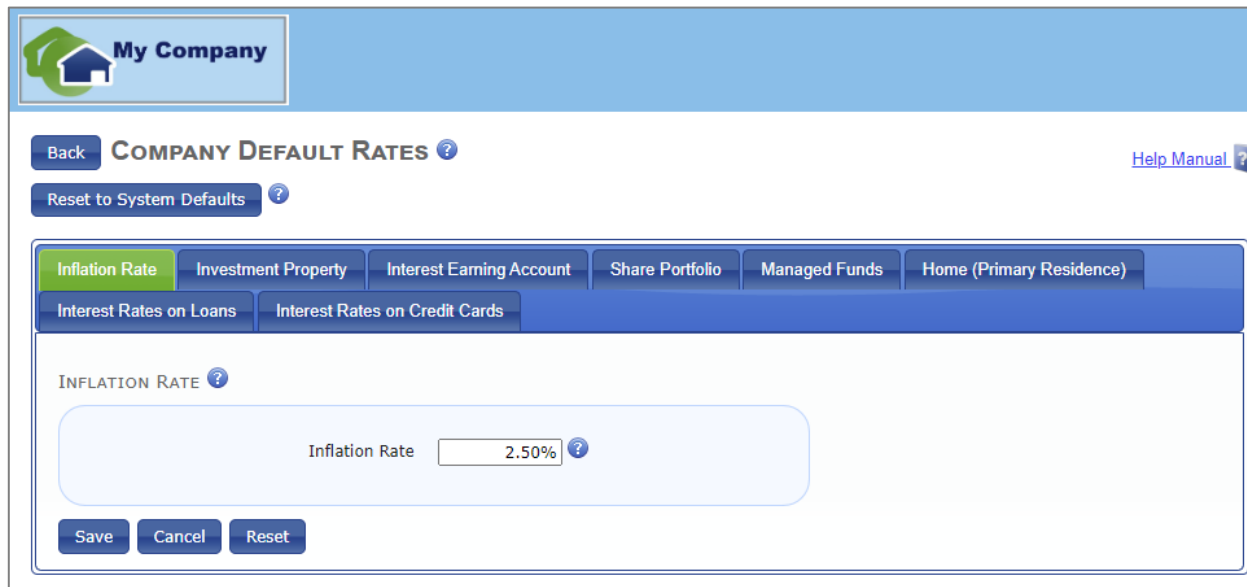
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Default Rates Entry

To change the **Default Rates** from the starting values in the Financial Mappers software, the **Chief FM Admin** selects Company Default Rates, from the dropdown list under their Username, as shown below.



Select each Tab to review and reset the Default Rates. These Default Rates are applied to every account holder using the company's **Financial Mappers LITE** account. That is all Lite Clients will use these company-specific Default Rates. However, any **Default Value** can be substituted with a **Specified Rate** in the plan.



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Default Rates – Starting Values in Financial Mappers

The **Default Rates** in *Financial Mappers* are based on the 20-year average returns from the Year 2000 and have been set as follows:

Inflation:	2.50%	(This rate is an ASIC requirement)
Returns		
Cash Accounts:	5.18%	(90 Day Bank Bill + 1%)
Term Deposits:	4.29%	(180 Day Bank Bill)
Bonds:	4.20%	(5-year Bond Rate)
Shares:	10.37%	(Dividends 4.25%, Capital Growth 6.12%)
Property:	10.37%	(Net Rent 4.25%, Capital Growth 6.12%)
Managed Funds:	10.60%	(Dividends 4.48%, Capital Growth 6.12%)
Superannuation Returns:	7.00%	(Pre-filled entry per plan – not a default rate)
Loan Interest		
Principal & Interest Loans		
Home Loans:	6.67%	
Investment Property:	6.67%	
Shares:	7.67%	
Personal:	9.67%	
Interest Only Loans		
Home Loans:	7.17%	
Investment Property:	7.17%	
Shares:	8.17%	
Personal:	10.17%	
Credit Cards		
Purchases Rate:	15.00%	
Introductory:	3.00%	

If you decide to use Rates from a different time period, this information is based on historical data for the different time periods.

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	Average Historical Rates			
	20 Yrs	15 Yrs	10 Yrs	5 Yrs
Start Year	2000	2005	2010	2015
End Year	2019	2019	2019	2019
Inflation	2.50%	2.40%	2.11%	1.74%
Home Loan Standard	6.67%	6.58%	6.07%	5.32%
Investment Property Loan (+ 0.5% Margin Home)	7.17%	7.08%	6.57%	5.82%
Share Portfolio Loan (+1% Margin Home)	7.67%	7.58%	7.07%	6.32%
Personal Loan (+3% Margin Home)	9.68%	9.60%	9.09%	8.35%
Cash Rate (90 BB +1%)	5.18%	4.80%	3.82%	2.90%
Term Deposit 180 BB	4.29%	3.93%	3.00%	2.02%
Bonds - 5 yrs	4.20%	3.76%	2.88%	2.00%
Share Dividend	4.36%	4.40%	4.55%	4.68%
Share Capital Growth	5.47%	4.94%	3.71%	4.67%
Managed Fund Dividend	4.48%	4.42%	4.28%	4.14%
Managed Fund Cap Grth	6.12%	5.10%	4.66%	4.48%
Pension Fund	10.80%	9.81%	9.16%	9.30%
Property Income	5.00%	5.00%	5.00%	5.00%
Property Cap Growth	6.76%	5.26%	5.62%	4.29%
Ave Share & Prop Cap Growth	6.12%	5.10%	4.66%	4.48%

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4. Creating a set of Reports to use in the Plan Review

The screenshot shows the 'My 5-Year Savings Plan' report interface. The header includes 'My Company' logo, the plan title 'My 5-Year Savings Plan' for 'Seth & Sue Alby', and a 'client review' icon. Navigation tabs include Plan Details, Report (selected), Documents, Q&A, MoneySmart Advice, MoneySmart Videos, Our Videos, and Budget Tips. The main content area is titled 'Cover Page & Table of Contents'. The cover page on the left displays the plan title, generation details (Seth Alby and Sue Alby, Date of Birth: 1/01/1982 and 6/01/1982, Current Age: 35 and 35, Address: 1 Smith Street St Kilda VIC 3065), and a disclaimer. The table of contents on the right lists 20 items: 1. Important Information, 2. Can you afford this plan?, 3. A Snapshot of your Finances, 4. Review Dashboard, 5. Net Wealth, 6. Plan Objectives & Financial Targets, 7. Lifestyle Goals and Milestones, 8. Savings Strategy, 9. Your Budget, 10. Annual Transactions, 11. About your Debts, 12. Your Loans, 13. Your Real Estate, including Home, 14. Interest Earning Accounts, 15. Shares and Managed Funds, 16. Superannuation, 17. Personal Assets at Start of Plan, 18. Insurance, 19. Statistics, and 20. Net Value of Investments and Retirement Accounts.

Financial Mappers provides a set of templated Reports. One was created specifically for *Financial Mappers^{LITE}*. We believe this report will meet the needs of both the client and the sponsor company who may be sent a copy of the report generated by the plan. This report is called **My 5-Year Savings Plan**.

We have expanded that list and we believe the first four would be sufficient for most companies.

←

Reports

⚙️

Client Review Configuration

+

Create New Report

📘

NB:

•

A report is only visible to users if it is both **active** *and* **published**.

•

Only the latest published version is generated for users. Click the button in the **Published** column to see the list of published versions for a report.

Name	Plan Type	Active	Published	
My 5-Year Savings Plan	Savings	<div>✓</div>	<div>✓</div>	<div><div>↑</div><div>↓</div><div>👤</div><div>👁</div></div>
My Plan Map (Illustrated)	All	<div>✓</div>	<div>✓</div>	<div><div>↑</div><div>↓</div><div>👤</div><div>👁</div></div>
My Debt Management Report	All	<div>✓</div>	<div>✓</div>	<div><div>↑</div><div>↓</div><div>👤</div><div>👁</div></div>
My Property Report	All	<div>✓</div>	<div>✓</div>	<div><div>↑</div><div>↓</div><div>👤</div><div>👁</div></div>
My Plan Review	All	<div>✓</div>	<div>✓</div>	<div><div>↑</div><div>↓</div><div>👤</div><div>👁</div></div>
My Plan Summary	All	<div>✓</div>	<div>✓</div>	<div><div>↑</div><div>↓</div><div>👤</div><div>👁</div></div>

It is recommended you start with a selection of these reports and they can be amended or changed later. You may like to book a Zoom Meeting to discuss what you would like changed and receive some guidance during the process. Meetings can be booked through Calendly.

<https://calendly.com/financialmappers/team-training>

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Read the manual on how to create reports for more information. *Financial Mappers* can guide you on how to do this. *Financial Mappers* has created a number of Report Templates for PRO and LITE. The primary report for **LITE** is **My 5-Year Savings Plan**. We believe this report will capture all the information both you and your client will need. Reports created in the Report Builder can be uploaded into the **Plan Review**. This report includes the information in the section **About Me and My Family** (Starting Position Page)

To use a Template Report, you must select the **COPY** icon. When it is listed in your Reports Section, click on the link and complete the following:

1. Click **Yes**, to make report **Visible to Clients**
2. Click **Publish New Version**
3. Click **Save**


If you edit the Report, you must always return to this screen and publish a new version.

The screenshot shows the 'Report Details' form for 'My 5-Year Savings Plan'. The form includes fields for Name, Description, Suitable for Plan Type, Theme, and Visible to Clients. The 'Visible to Clients' section has 'Yes' and 'No' buttons. Below this is the 'Active' status with a green checkmark and a red 'X' button. The 'Versions' section includes 'Manage Versions' and 'Publish New Version' buttons. A status message indicates the current version was published on 09:05 AM Saturday 6 Apr 2020. At the bottom are 'Delete', 'Copy', 'Close', and 'Save' buttons. Three blue arrows with numbers 1, 2, and 3 point to the 'Yes' button, 'Publish New Version' button, and 'Save' button respectively.

On the tab, **Client Review Configuration**, you can upload documents you want displayed for all Reports, such as your Financial Services Guide.

If you wanted to use the financial literacy information provided by the ASIC MoneySmart, **you could make this information visible.** You can also upload your own educational content in the form of PDF's or Videos. In this example the **MoneySmart** TABs have been made **Visible** and two additional **Resource** TABs have been created.

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 My Company

[←](#) Client Review Configuration Open Client Review (new tab)

General Documents

+ Add Document

General Documents are included in the Client Review for all plans and reports.

✖ There are no documents yet.

Navigation

Customise the Client Review navigation by showing or hiding the MoneySmart tabs, and creating your own custom resource tabs. The navigation preview below will update as you make changes.

Navigation Preview

Plan Details Report Documents Q&A MoneySmart Advice MoneySmart Videos Our Videos Budget Tips

MoneySmart Tabs

MoneySmart Advice Tab	Links to ASIC's MoneySmart articles on financial literacy	<input checked="" type="checkbox"/> Visible
MoneySmart Videos Tab	Links to ASIC's MoneySmart short videos	<input checked="" type="checkbox"/> Visible

Resource Tabs

+ Add Resource Tab

Our Videos	<input checked="" type="checkbox"/> Visible	↑	↓	✖
Budget Tips	<input checked="" type="checkbox"/> Visible	↑	↓	✖

When you click on **+ Add Resource Tab**, the following dialogue box is displayed.

Add Resource Tab

Name

Description

File Edit View Insert Format Tools Table



Formats

B *I* A 14px

☰ ☱ ☲ ☳

☴ ☵ ☶ ☷

☸ ☹

POWERED BY TINYMCE

Resources

+ Add Resource

ⓘ You need to [save this tab](#) before adding resources.

✖ Cancel Save

Read the [Overview Document](#) on how you can customise and upload the **Financial Mappers Videos** if you wish to use this resource.

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If may upload the three [How Clients Use Videos](#) which are on the website. These videos can be customised to use your branding.

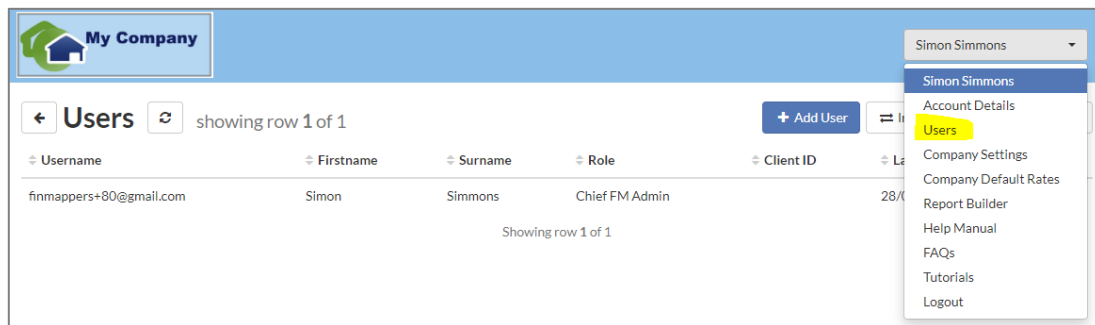
5. Adding Users to your LITE Account

The **Chief FM Admin** now adds any other team members who will be accessing the administrative section of the software. This is done by inviting the nominated members to register.

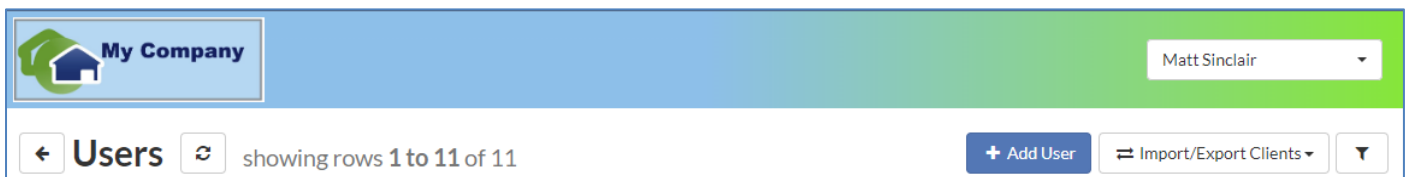
They may have the role of either **Chief FM Admin** (access to all the software) or **FM Admin** (access limited to the USERS page).

Both roles can also **EDIT** the details of LITE Clients and Premium Lite Clients.

The **Chief FM Admin** must first go to the **Users** page, which is in the dropdown list under the Username.



In the section, **Users**, click on the button **Invite User**, and enter the information.



The **Chief FM Admin** should also invite any other team members, whose role will be one of the following:

- Chief FM Admin (access to Users, Company Settings, Default Rates & Report Builder)
- FM Admin (access to Users only)

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Add User

Email (Username) Verified ✗ No

Required

Role ? Clients

Contact Details

Principal

Firstname Surname

Initials DOB

Partner

Firstname Surname

Initials DOB

Personal

Phone

Work

Employer

Address

Address

Suburb State Postcode

Australia

Each person receives an email to register an account within your company's Financial Mappers LITE site.

6. Import Client Contact Details with a CSV File

People with the role of either the Chief FM Admin or the FM Admin can import Client Contact Details.

My Company Simon Simmons

Users showing row 1 of 1

Import/Export Clients

Username	Firstname	Surname	Role	Client ID	Last Login
finmappers+80@gmail.com	Simon	Simmons	Chief FM Admin		28/05/2020 6:21 am

Showing row 1 of 1

Please read the details about this in the **Financial Mappers Lite Overview Document**.

Financial Mappers will be integrating with numerous CMSs (Customer Relationship Management Systems). The first was **WorkSorted** and there are more to follow. If your platform is integrated, you should select it from the drop-down list. You should also use the same Client ID.

Financial Mappers LITE - Onboarding Process

Add User

Email (Username)

Verified

✖ No

Required

Role ?

Lite Client

Advisers

(None)

Client ID and CMS ?

Client ID

Worksorted

Partner Client ID

Client ID is used to link to the selected CMS

Contact Details

Principal

Firstname

Surname

Initials

DOB

Partner

Firstname

Surname

Initials

DOB

Personal

Phone

Address

Suburb

State

Postcode

Australia

Work

Employer

Address

Suburb

State

Postcode

Australia

✖ Cancel

Save

Financial Mappers Lite offers a second choice of Client Type. It is anticipated that most of your clients will remain as **Lite Clients**. The second option is the **Premium Lite Client** who has access to all the features of Financial Mappers with a plan length extended to up to 50-years.

Refer to the **Overview Document** for details.

Agreement and Billing

Disclosure Statement & Default Rates

Your company is required to provide a **Disclosure Statement** for all Reports. Your company's Disclosure Statement should be uploaded into your Financial Mappers **LITE** account after registration of your account and prior to using Financial Mappers LITE with clients.

This Disclosure Statement must be uploaded via your Company Settings page, as described previously, prior to using Financial Mappers Lite with clients.

In the **Financial Mappers Lite Licence Agreement**, you will be asked to acknowledge that you have uploaded a suitable Disclosure Statement in line with the guidelines in this document.

If you change the Default Rates you **MUST** modify the Disclosure Statement accordingly and explain the reasons for that change.

Financial Mappers engaged Michael Anastas of HWL Ebsworth Lawyers to advise on a suitable **Disclosure Statement**. He also advised on making sure that *Financial Mappers* does **NOT** require an **AFSL** as it is **exempt** under **ASIC Class Order 05/1122**.

However, this will not apply if you are providing General or Personal Advice under your AFSL.

It is important that your Disclosure Statement does not breach the terms under which you operate your business.

Financial Mappers LITE - Onboarding Process

Agreement

A blank copy of the **Financial Mappers LITE Licence Agreement** is in the [Onboarding Document Section](#).

The *Financial Mappers LITE Licence Agreement* should be signed and returned to Glenis Phillips (glenis.phillips@financialmappers.com.au).

This can be completed electronically.

Billing

Once you have signed the Agreement, you will be sent an invoice for your URL License Fee, which is paid annually.

At the end of each month, you will be sent an invoice for the number of Lite Clients onboarded that month. The subscription is for a 12-month period. There are no fees for the roles of administrator.

Invoices should be paid to the following account. We have no credit card facility for company accounts.

Bank Payment

Account Name: Plencore Online Pty Ltd
Swift/BIC Code: NATAAU33
BSB: 083-088
Account Number: 74-183-7086

Contacts

Glenis Phillips

Director Plencore Online Pty Ltd

glenis.phillips@financialmappers.com.au

Mobile: 0411 086 532

Plencore Online Pty Ltd
T/A Financial Mappers

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