

# FinancialMappers<sup>®</sup>Pro

## Pro<sup>CONNECT</sup>

## Onboarding Process

With 30 Day FREE trial

### CONTACT

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# Financial Mappers Pro Onboarding Process

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## Introduction

### Onboarding Process Summary

The 30-day trial is divided into two sections:

1. The company principal or persons assigned to evaluate the software will trial Financial Mappers Pro on our demonstration platform for the fictitious company called [Good Advice](#).
2. The company will co-ordinate with Glenis Phillips the commencement date of their trial. Upon commencement, the participants will be sent the login details for the Good Advice platform and they will then receive the first of seven emails sent every second day, over the 14-day trial period.
3. During the trial period, participants are welcome to book a Zoom meeting for additional assistance. Please book on [Calendly](#).
4. At the end of this 14-day trial period, your decision is whether to proceed to a further 16-day trial of your own Financial Mappers Pro account with your team. If you decide to proceed, you complete the Team Training document, and return to Glenis Phillips.
5. Your nominated Chief FM Administrator will be invited to set up your personal Financial Mappers Pro platform and invite your team members to join it.
6. The date of commencement will be coordinated with Glenis Phillips. Over the following 16 days the team can familiarize themselves with the software. Each team member will be sent a daily email for 5-days highlighting the main features of the software.
7. During this 16-day trial / training period, Glenis Phillips will provide a Zoom Training meeting (1-hour) for all staff once each week. Any staff who require additional training will be provided with access to Glenis Phillips by either phone, email or zoom meeting.

# Financial Mappers Pro Onboarding Process

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## Onboarding to the Company Platform

1. If you decide to proceed to the **16-day Free Training Period**, email Glenis Phillips and advise the following:
  - a. Name and Email address of the person who will have the role of **Chief FM Administrator** (see responsibilities of role on page 6)
2. Your **Chief FM Administrator** will then be sent a link to set up and customise your created Financial Mappers Pro installation.
3. The **Chief FM Administrator** invites those advisers and paraplanners trialing the software to register as users. Once registered they can create test clients and trial the software functionality.
4. The **Chief FM Administrator** should activate at least one of the **Template Reports**, so that the Client Review App can be used.
5. When you are ready to commence using Financial Mappers Pro with clients, complete and sign the Financial Mappers Pro Agreement. Your first billing cycle will commence at the end of the free 30-day Trial and Training Period if you wish to commence early.

### Note on Assistance During the Team Training Period:

During the training period, the team members who are not on the Trial Process, will be sent five automated emails for 5-days. These will be coordinated so all team members receive emails on the same day.

The Company may book two one-hour Training (Zoom) Meetings over the 2-week training period. Any Team Member is welcome to arrange a private Zoom meeting with Glenis if required.

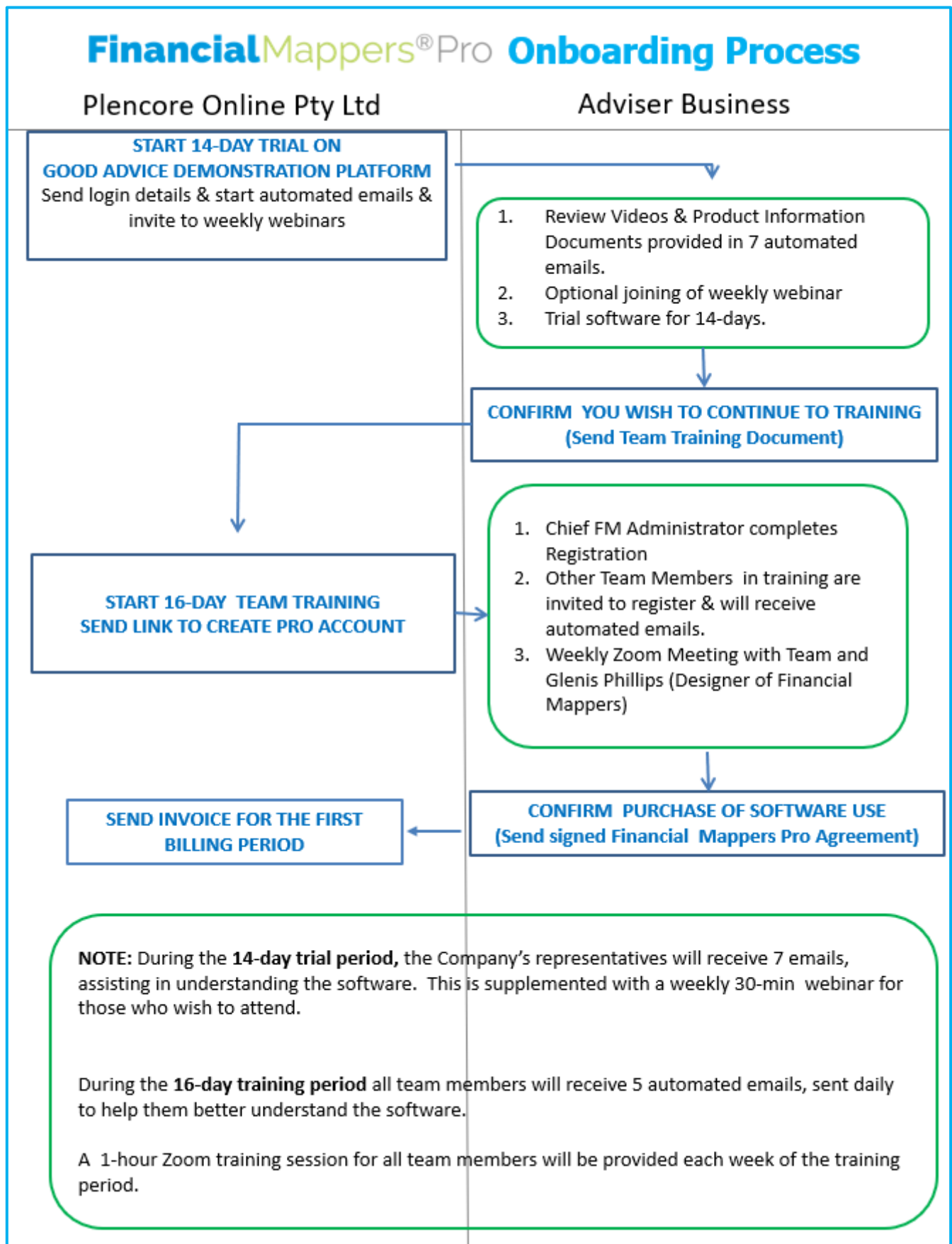
### Note on Paraplanners:

Paraplanners are not able to initiate a plan. They can only work on plans shared by their adviser. It is recommended that the Adviser create a Sample Plan and share it with the Paraplanner for them to experiment. Please note that there are only two Sample plans which are Joint Plans, so we recommend you use either of these for your paraplanner.

Some paraplanners may prefer to be given “adviser” access to the Good Advice platform, in addition to their own, so that they can access Sample Plans and create plans independent of their adviser.

# Financial Mappers Pro Onboarding Process

## Onboarding Process Summary Diagram



# PRO Account Creation and Customization - Detailed Steps

## 1. Chief FM Administrator Nomination

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

### 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 **Pro** 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).
- Setting of the company's default rates (that is – all rates used in the model calculations).
- Creation of any additional company specific reports via the Report Builder.
- 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.

The **Chief FM Admin role** also has access to all functions included in the FM Admin, and Adviser/Broker roles. (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)

This means the **Chief FM Admin** role can also do the following:

- Invite specific Advisers/Brokers and Paraplanners to each register a Financial Mappers account within the company's **Pro** system.
- Invite office staff who may require access to information on the "User's Page".
- Edit the details of Clients and Connect Clients, including the closing of the account.
- Add or remove all client types to an adviser list.

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 **Pro** account (website).

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

# Financial Mappers Pro Onboarding Process

## 2. Pro Account Creation

When the **Chief FM Admin** receives an email from Plencore Online Pty. Ltd. with link to the **NEW PRO 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)

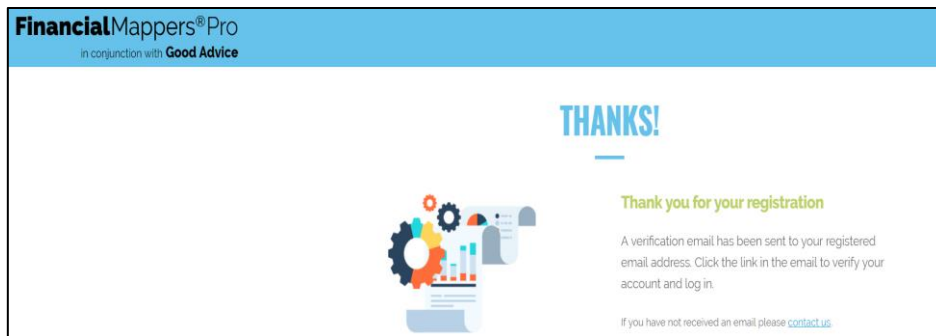
The **subdomain name** to be used for your Financial Mappers Pro account, is shown by XXXXXX in the following example: <https://XXXXXX.financialmappers.com.au>. This will typically be your business name, or a short version of it. Choose this carefully. It cannot be changed.

**Please ensure you bookmark you company's URL.** This is the link you will use to log into your account. This is the URL for Good Advice: <https://goodadvice.financialmappers.com.au/>

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

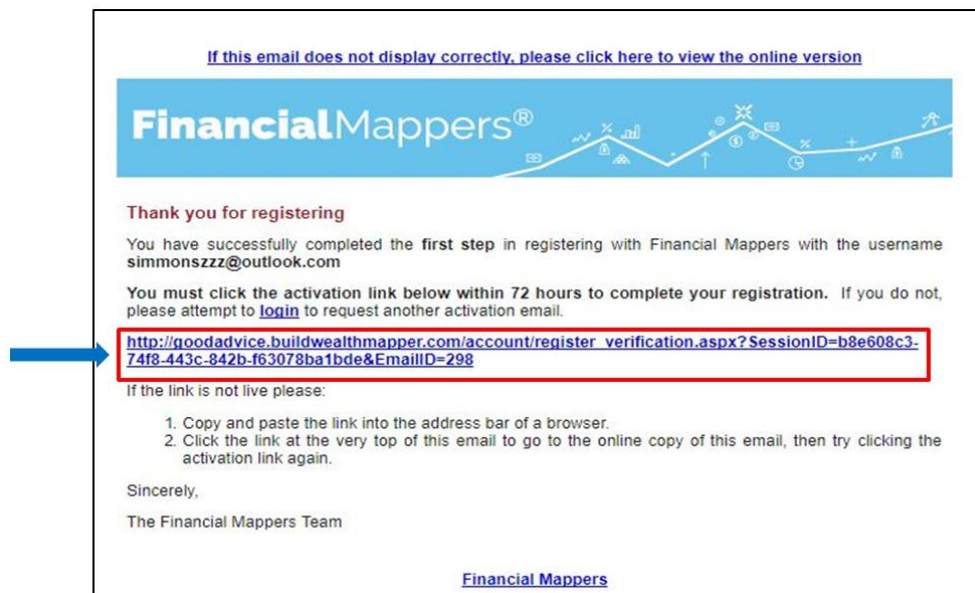
The screenshot shows the 'NEW PRO REGISTRATION' form. On the left, there is a logo with gears and a bar chart, and a welcome message: 'Welcome to FinancialMappers Pro. To get your company started, it is important that the person who received the link to register the company is the first to register. This person will be the Administrator. After registration, the Administrator should go to **FM Admin** to configure the company and invite advisers. Only the Administrator can invite advisers to the system. Once registered, each adviser can invite their clients to join FinancialMappers Pro.' On the right, there are input fields for: First Name (Simon), Last Name (Simmons), Email (Username) (simmonszzz@outlook.com), Confirm Email (simmonszzz@outlook.com), Company Name (Good Advice), ABN (48 567 907), Sub Domain (goodadvice, with a note 'May contain letters, numbers and hyphens' and a preview 'goodadvicebuildwealthmapper.com'), Billing Address (simmons@outlook.com, 28 Smith Street, Address Line 2, Hamilton, Queensland 4007, Australia), and Terms (I agree to the site's terms and conditions). A 'REGISTER' button is at the bottom right.

# Financial Mappers Pro Onboarding Process



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 Good Advice Pty Ltd, and the **Chief FM Admin** is Simon Simmons.

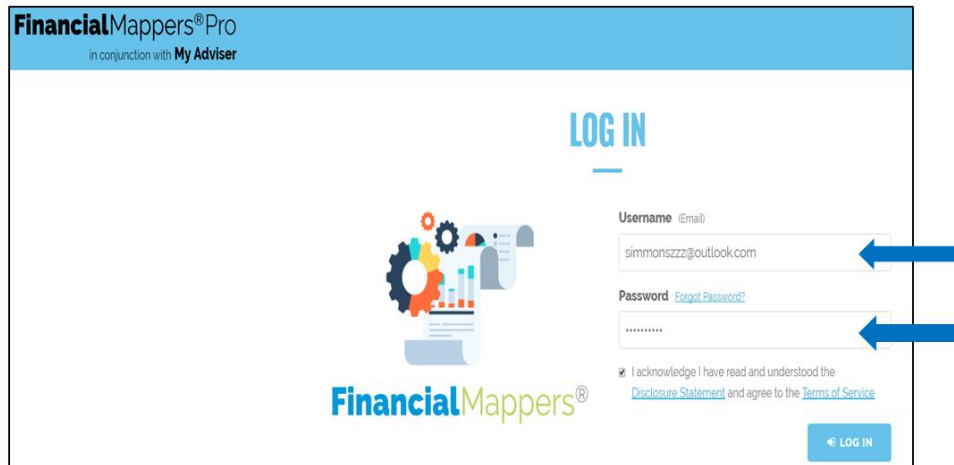


The screenshot shows the 'REGISTRATION VERIFIED' page of Financial Mappers Pro. The header is blue with the logo. Below it, the text says: 'You have successfully verified your email address. Please use the form below to set your password'. There are two input fields: 'Password' and 'Confirm Password', both with masked characters (dots). A large blue arrow points to the 'Password' field. Below the fields is a blue button labeled 'Save Password'.



# Financial Mappers Pro Onboarding Process

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



The image shows the login page for Financial Mappers Pro. The header includes the logo 'FinancialMappers® Pro' and the text 'in conjunction with My Adviser'. The main heading is 'LOG IN'. Below this is a graphic of a person with a gear and a bar chart. To the right of the graphic are two input fields: 'Username (Email)' with the value 'simmonszzz@outlook.com' and 'Password' with a masked value '\*\*\*\*\*'. There is a 'Forgot Password?' link next to the password field. Below the fields is a checkbox for 'I acknowledge I have read and understood the Disclosure Statement and agree to the Terms of Service'. At the bottom right is a 'LOG IN' button. Two blue arrows point to the Username and Password fields.

**PLEASE NOTE:** Some companies prefer their admin staff to be the **Chief FM Admin**. If this is the case please notify Glenis Phillips, of Plencore Online Pty Ltd and special arrangements can be made.

## 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):

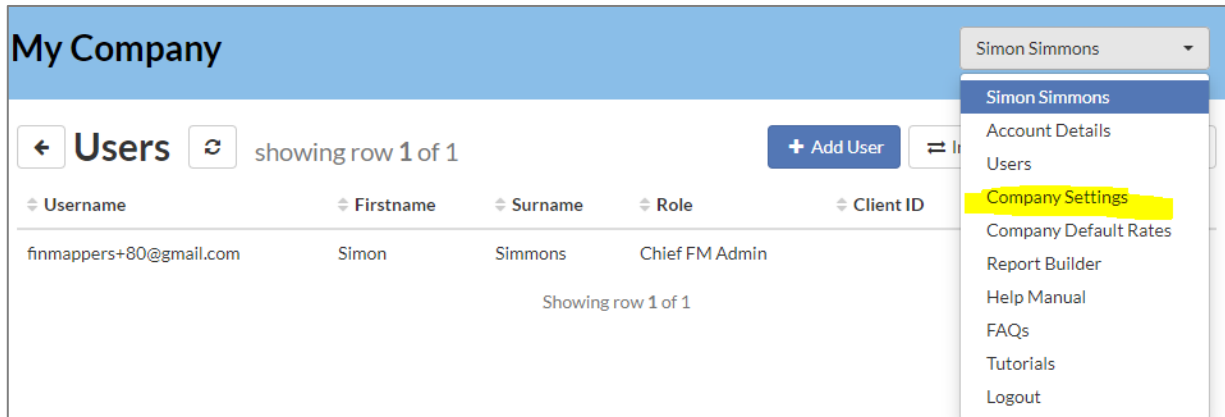


The image shows the Financial Mappers Pro interface. The header includes the logo 'FinancialMappers® Pro' and the text 'in conjunction with Good Advice'. Below the header is a navigation bar with a 'Good Advice Looking After Your Finances' logo. A text box on the left says 'Click on the User Name and select Company Settings'. A blue arrow points from this text box to a dropdown menu on the right. The dropdown menu is open, showing a list of options: 'Simon Simmons', 'Account Details', 'My Plans', 'Sample Plans', 'Users', 'Company Settings' (highlighted in green), 'Company Default Rates', 'Report Builder', 'Help Manual', 'FAQs', 'Tutorials', and 'Logout'. The entire dropdown menu is enclosed in a red border.

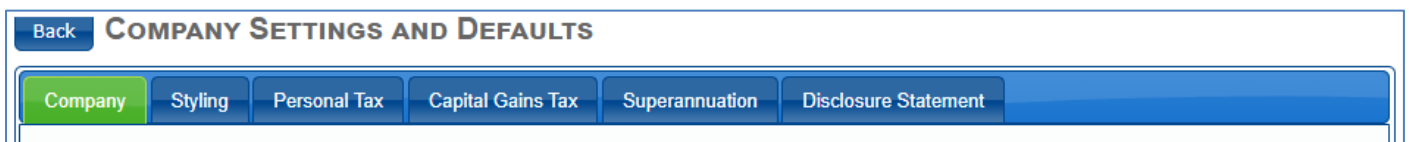
# Financial Mappers Pro Onboarding Process

## 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.

# Financial Mappers Pro Onboarding Process

## COMPANY DETAILS


Company Name

Good Advice

Sub-domain

goodadvice.financialmappers.com.au

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

None

On the same page you will find a section called **IMPRINT**.

Any information entered into this section will be included in the footer section of each page of the software. It is intended to enter any licensing information if your Company wants to display the information. Some *Dealer Groups* may require disclosure of licensing information.

This is an example for the fictitious company Good Advice.

## IMPRINT

Use to display legal information in the footer area of every page.

Good Advice Pty Ltd (#999999) is a Corporate Authorised Representative of ZZZ Financial Services Pty Ltd ASFL No. #666666.

This is how the information is displayed in the bottom banner:

Version: 3.118.0.0

[Contact Us](#) | [Disclosure Statement](#) | [Privacy Statement](#) | [Terms of Service](#)

Good Advice Pty Ltd (#999999) is a Corporate Authorised Representative of ZZZ Financial Services Pty Ltd ASFL No. #666666.

This software should not be relied on for the purposes 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 decisions. Default rates used by the software are explained in the Disclosure Statement. If you change the default rates, or specify your own rates, you are responsible for the calculation outcomes, and the Disclosure Statement does not apply.

# Financial Mappers Pro Onboarding Process

## Please Note:

If you are a solo practitioner, you could include your Authorised Representative name and number. However, the best place for this is in the footer of Reports, when the correct information for each adviser is selected and displayed. Information is found in the QuickStart Document, [FM Pro How to Use the Report Builder](#), pages 22 – 24.

## Styling


The **Chief FM Admin** uploads the company's Logo for the top banner and colors for the Banner and Footer.

**COMPANY SETTINGS AND DEFAULTS**

Company Styling Personal Tax Capital Gains Tax Superannuation Disclosure Statement

**BANNER FORMATTING**

Include Banner Text ☐ "FinancialMappers Pro in conjunction with Good Advice"

Banner Logo 

Upload New Logo Remove Logo

Primary Banner Colour #6BC3EB

Secondary Banner Colour #6BC3EB Copy Primary

**FOOTER FORMATTING**

Primary Footer Colour #B1D575

Secondary Footer Colour #B1D575 Copy Primary

Save Cancel

These can be two-toned if required.

**FinancialMappers® Pro** 

In conjunction with **Good Advice**

Back **SETTINGS**

Business Name Good Advice

Subdomain goodadvice.financialmappers.com.au

Logo 

Upload New Logo

Primary Banner Color #9F59EA

Secondary Banner Color #EA53E7 Copy Primary

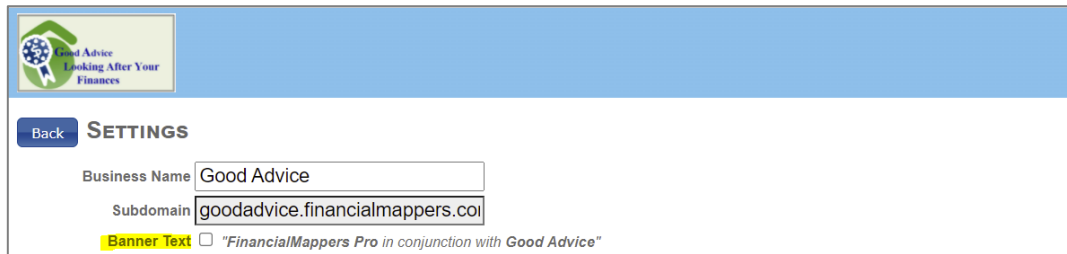
Primary Footer Color #853D8F

Secondary Footer Color #853D8F Copy Primary

Save

# Financial Mappers Pro Onboarding Process

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



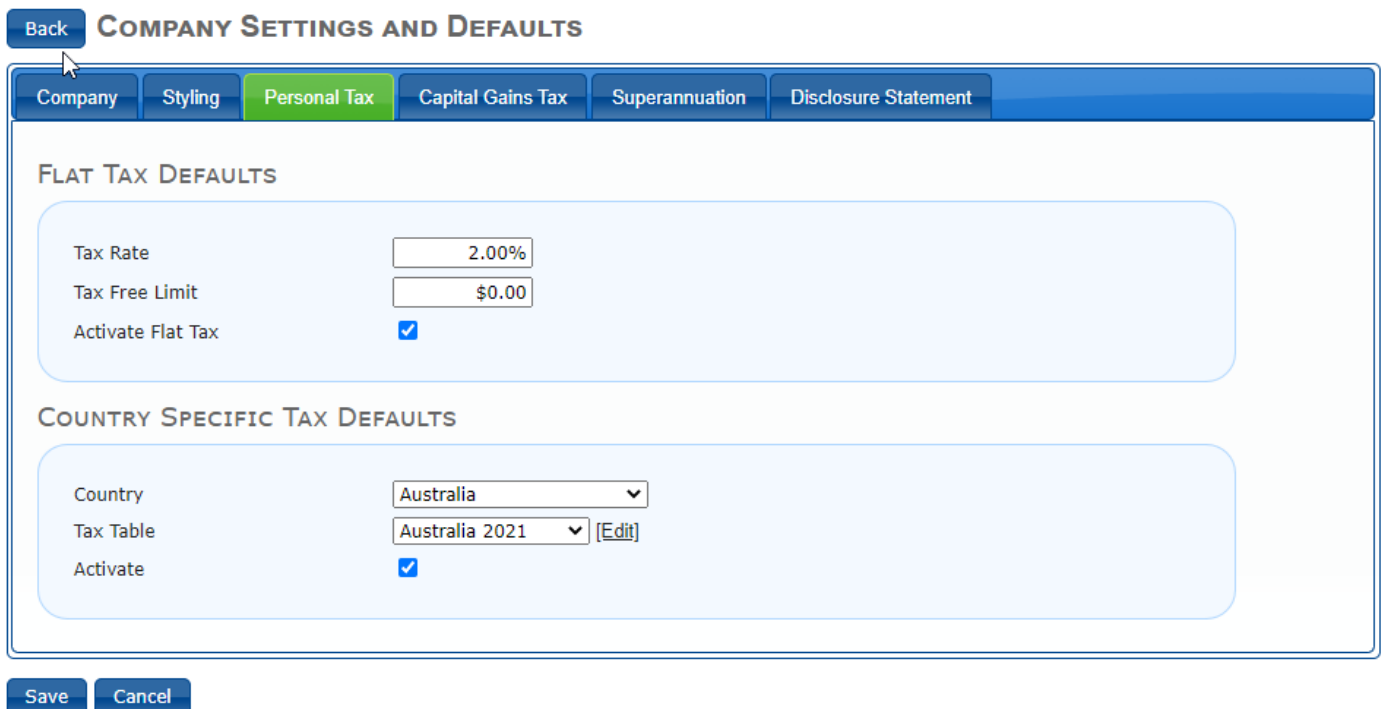
**SETTINGS**

Business Name: Good Advice

Subdomain: goodadvice.financialmappers.co

**Banner Text** ☐ "FinancialMappers Pro in conjunction with Good Advice"

## Personal Tax



**COMPANY SETTINGS AND DEFAULTS**

Company Styling **Personal Tax** Capital Gains Tax Superannuation Disclosure Statement

**FLAT TAX DEFAULTS**

Tax Rate: 2.00%

Tax Free Limit: \$0.00

Activate Flat Tax: ☒

**COUNTRY SPECIFIC TAX DEFAULTS**

Country: Australia

Tax Table: Australia 2021 [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: 2.00%

Tax Free Limit: \$0.00

Activate Flat Tax: ☐

**COUNTRY SPECIFIC TAX**

Country: New Zealand

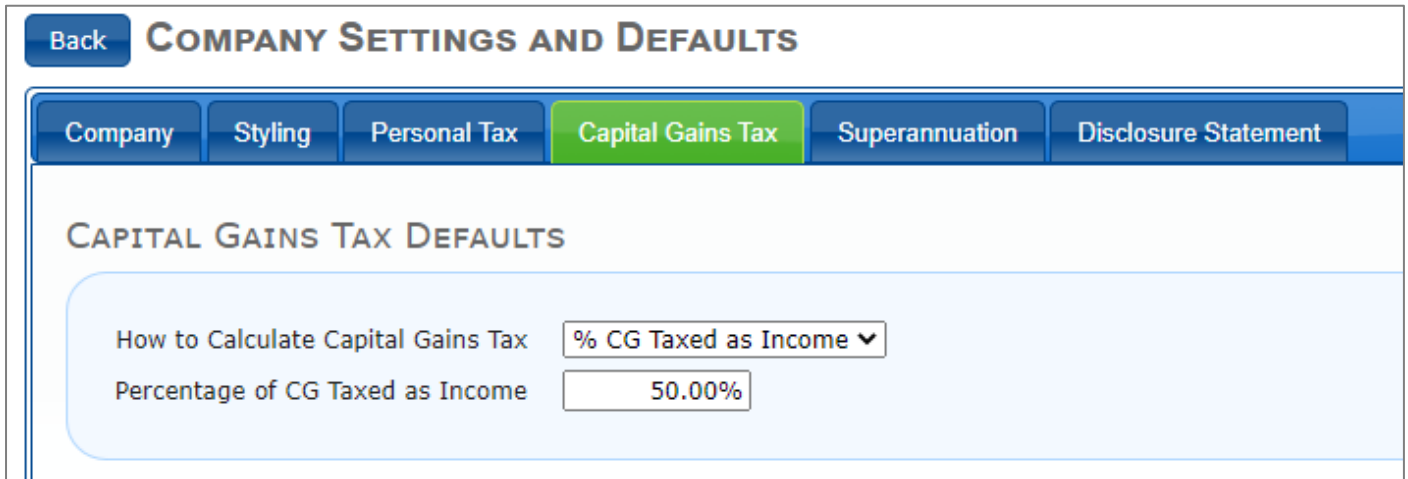
Tax Table: New Zealand 2022

Activate: ☒

# Financial Mappers Pro Onboarding Process

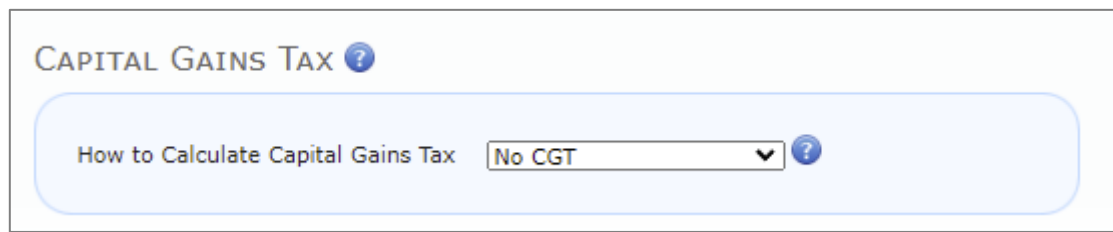
## Capital Gains Tax

The Capital Gains Tax defaults to that of Australia.



The screenshot shows a web interface titled "COMPANY SETTINGS AND DEFAULTS". At the top, there is a "Back" button and a navigation bar with tabs: "Company", "Styling", "Personal Tax", "Capital Gains Tax" (which is highlighted in green), "Superannuation", and "Disclosure Statement". Below the tabs, the section is titled "CAPITAL GAINS TAX DEFAULTS". Inside this section, there are two settings: "How to Calculate Capital Gains Tax" with a dropdown menu set to "% CG Taxed as Income", and "Percentage of CG Taxed as Income" with a text input field set to "50.00%".

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



This screenshot shows a simplified view of the "CAPITAL GAINS TAX" settings. The title "CAPITAL GAINS TAX" is followed by a help icon (?). Below it, the "How to Calculate Capital Gains Tax" dropdown menu is set to "No CGT", also accompanied by a help icon (?).

## Superannuation

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

## Financial Mappers Pro Onboarding Process

[Back](#) **COMPANY SETTINGS AND DEFAULTS**

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

**FUND RULES DEFAULTS**

By Country Australian Superannuation ▼

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

**FUND TYPE**

Gender Male ▼ ?

Format ☐ Universal ?

☒ By Country ?

KiwiSaver ▼

# Financial Mappers Pro Onboarding Process

## Disclosure Statement

Company	Styling	Personal Tax	Capital Gains Tax	Superannuation	Disclosure Statement
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**DISCLOSURE STATEMENT**

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.

Where this report has been generated by a Financial Adviser, they will have taken into consideration the most appropriate advice for your personal financial situation.

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.

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](#).

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



## Financial Mappers Pro Onboarding Process

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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.

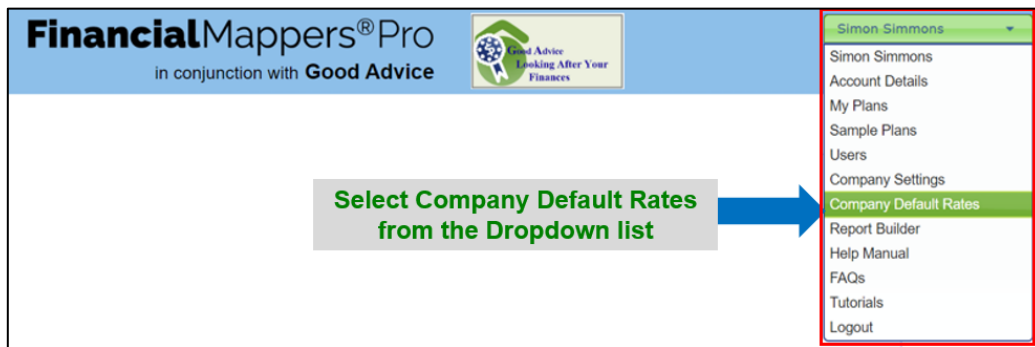
You should not rely solely on this software for the purpose of making a decision in relation to any financial product and you should consider obtaining advice from a financial services licensee before making any financial decision.

# Financial Mappers Pro Onboarding Process

## Disclosure Statement Entry

### 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 Pro** account. That is - all Advisers/Brokers, Paraplanners and Clients will always use these company-specific Default Rates.

The screenshot shows the 'COMPANY DEFAULT RATES' page. At the top, there is a 'Back' button and a 'Reset to System Defaults' button. Below these are several tabs: 'Inflation Rate' (selected), 'Investment Property', 'Interest Earning Account', 'Share Portfolio', 'Managed Funds', and 'Home (Primary Residence)'. Under the 'Inflation Rate' tab, there is a section titled 'INFLATION RATE' with a text input field showing 'Inflation Rate' and a value of '2.50%'. Below the input field are three buttons: 'Save', 'Cancel', and 'Reset'. At the bottom of the page, there is a footer with the version '3.52.0' and links for 'Contact Us', 'Disclosure Statement', 'Privacy Statement', and 'Terms of Service'. A small disclaimer text is also present at the bottom.

# Financial Mappers Pro Onboarding Process

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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%	

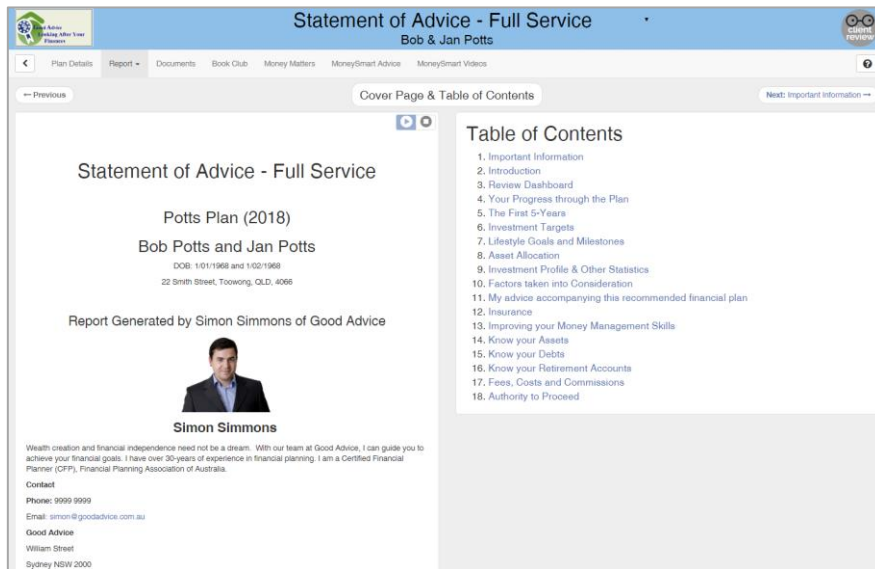
It is recommended that you decide very early what default rates you want to use for your company. As a guidance these are average rates over various time periods.

## Financial Mappers Pro Onboarding Process

	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%

# Financial Mappers Pro Onboarding Process

## 4. Creating a set of Reports to use in the Client Review App



Any reports created via the Report Builder can be created and uploaded to the Client Review area.

For details you should read the **Masterclass Document: Client Review App**, found in **Advanced Training** on the **Adviser QuickStart Resources**.

<https://www.financialmappers.com.au/trial-sequence-pages/masterclass/>





















Note that when the **Chief FM Admin** sets up the account, they should create a set of report templates for advisers to use in the Client Review portal. To make the process quick, *Financial Mappers* has provided a set of report templates. If you want to use any of these, simply copy and make any adjustments you desire. You must always publish any changes and ensure the report is active on your account.

Reports with the words Statements of Advice include all the SOA Editor Panels and other reports intended for Client Review which do not include any of the SOA Editor Panels. (Except the last two panels, Product Replacement & Wealth Tracker which have a separate purpose)

(The report called "My 5-Year Savings Plan" is intended for users who only have access to one 5-year plan, and the report is intended for client, not adviser use. Financial professionals using Pro should not use this Template Report.)

# Financial Mappers Pro Onboarding Process

## Templates

Name	Plan Type		
Debt Management Report	All		
First 5-Years of Client Plan	All		
My 5-Year Savings Plan	Savings		
Retirement Plan Report	Drawdown		
Short Form COVID-19 Super Access	All		
Statement of Advice	All		
Statement of Advice - (Insurance Only)	All		
Statement of Advice for Retirees	All		
Summary Report of Client Plan	All		
Wealth Tracker Performance Review	All		

During the training period, you may just use these reports and later take the time to customize each report according your requirements. You can also create your own reports, but having a template which can be edited is the most efficient way to get started.

## 5. Adding Users to your Pro Account



The **Chief FM Admin** now adds any other team members who will be creating or adjusting Financial Mappers plans, to the account. This is done by inviting the nominated advisers or brokers to register.

These team members are given the role of either **Adviser/Broker** or **FM Admin**.


The role of **FM Admin** should only be given to those who should have access to the **User Page**, where they can add other advisers/brokers and paraplanners or change the roles of people already on the system.

The role of **FM Admin** can also **EDIT** the details of Clients and Connect Clients.

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

**Only FM Admin staff have access to the Company's list of Users.**



Simon Simmons

- Simon Simmons
- Account Details
- My Plans
- Sample Plans
- Users**
- Company Settings
- Company Default Rates
- Report Builder
- Help Manual
- FAQs
- Tutorials
- Logout

## Financial Mappers Pro Onboarding Process

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

### Add User

Email (Username)

Verified

✕ No

Required

Role?

Adviser/Broker

Clients

(None)

### Contact Details

#### Principal

Firstname

Surname

Initials

DOB

#### Partner

Firstname

Surname

Initials

DOB

#### Personal

Phone

Address

Address

Suburb

State

Postcode

Australia

#### Work

Employer

Address

Address

Suburb

State

Postcode

Australia

✕ Cancel

Save

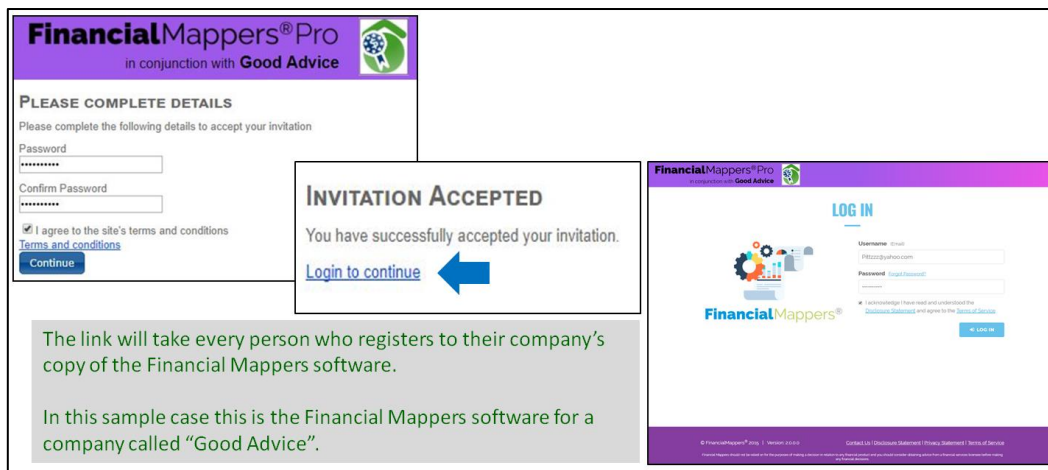
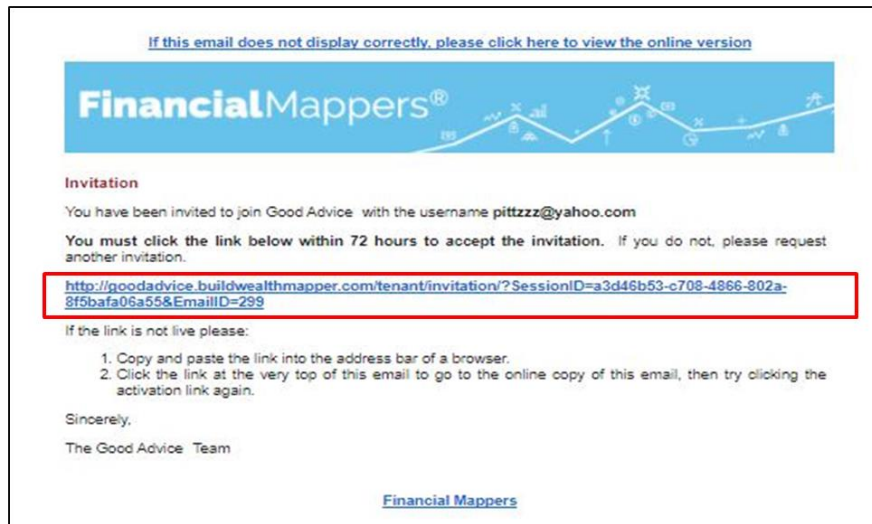
The **Chief FM Admin** should also invite any **Paraplanners** who will work on client Financial Mappers plans on behalf of the Adviser/Broker.

Each invited **Adviser/Broker** and **Paraplanner**, receives an email to register an account within your company's Financial Mappers Pro site.

Note that each role of **Adviser/Broker** and **Paraplanner** is a billable role, and will be added to the monthly invoiced usage. (*Paraplanner fees may be waived under certain conditions*)

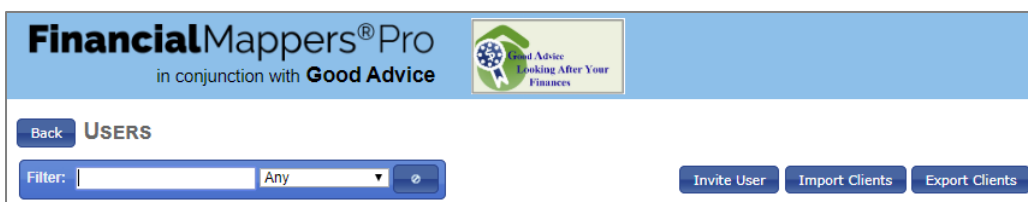
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# Financial Mappers Pro Onboarding Process



## 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.



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



## 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 **Pro** account after registration of your account and prior to using Financial Mappers Pro with clients.

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

In the **Financial Mappers Pro 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 Pro Onboarding Process

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## Agreement

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

The Pro Licence Agreement should be signed and returned to Glenis Phillips ([glenis.phillips@financialmappers.com.au](mailto:glenis.phillips@financialmappers.com.au)) to continue your usage of Financial Mappers Pro after the trial period expires.

We recommend against the creation of Client Plans for real clients until the contract has been signed and you have taken the steps to upload your company's applicable Disclosure Statement and Default Rates. If you decide not to proceed, your Financial Mappers Pro account is deleted, and all information is lost.

## Billing

If you choose to pay monthly, billing occurs on the first day of each calendar month in advance. On receipt of your signed **Pro Licence Agreement**, you will be sent a pro-rata invoice for the current month, payable in advance. From then on, your monthly fees for advisers and paraplanners will be billed on the 1<sup>st</sup> of each month.

It is recommended you set up an automatic payment for the 1<sup>st</sup> of each month. Once payment is received, you will be sent an Invoice/Receipt.

You do have the option to pay annually in advance, in which case you will be given a 10% discount on Licence fees for advisers and paraplanners.

Should you decide to use the optional Pro<sup>CONNECT</sup> feature, subscription fees are payable in full at the end of each month. You will be sent a separate invoice for these fees.

## Automatic Bank Payment

We recommend that you set up an automatic payment for your monthly Licence fees.

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

## Note to International Clients:

All accounts are in Australian Dollars and include Australian GST (Goods and Services Tax). If you are not registered for Australian GST, you will need to pay this tax, but will not be able to claim the refund.

To save excessive transfer fees, it is recommended to pay annually in advance, which also gives you a 10% discount on the monthly fees. Your annual fees with GST are:

## Financial Mappers Pro Onboarding Process

Schedule of Fees for Financial Mappers PRO			
	Fee	GST	Total
<b>Annual Fees</b>			
Adviser	\$1,080	\$108	\$1,188
Paraplanner	\$540	\$53	\$594
ProConnect	\$50	\$5	\$55
ProConnect LITE	\$20	\$2	\$22
<b>Monthly Fees</b>			
Adviser	\$100	\$10	\$110
Paraplanner	\$50	\$5	\$55
<b>Schedule of Fees for Financial Mappers LITE</b>			
<b>Annual Fees</b>			
Administrator	\$0	\$0	\$0
Lite Client	\$20	\$2	\$22

International clients should talk to Glenis Phillips about having the **Historical Data** for their country and **Tax Schedules** uploaded to Financial Mappers.

### Contacts

#### Glenis Phillips

Director Plencore Online Pty Ltd

[glenis.phillips@financialmappers.com.au](mailto:glenis.phillips@financialmappers.com.au)

Direct Line: 07 3216 4132

Mobile: 0411 086 532

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