



### Five ways to use Financial Mappers

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Version: 16.08.2022.

Plencore Online Pty Ltd is a wholly owned subsidiary of Plencore Wealth Ltd and is the online retail section of the company. For additional information about the software, contact Glenis Phillips, the concept designer. ([glenis.phillips@financialmappers.com.au](mailto:glenis.phillips@financialmappers.com.au) or phone Direct Line)

# Five ways Financial Mappers can help your practice

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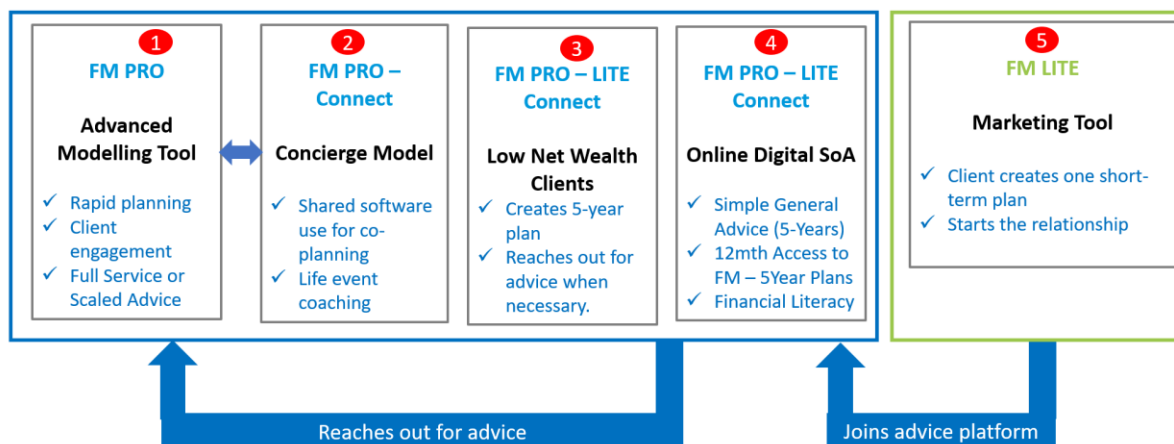
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# The Five Choices for Financial Mappers Products

Whatever your client base, *Financial Mappers* can provide a solution to suit your needs.



## Five ways Financial Mappers can help your practice



## Financial Mappers Pro – Advanced Modelling Tool (1)

*Financial Mappers Pro* is holistic cash flow modelling, interlinking finances, and lifestyle.

An entire plan and reports can be remodeled with a single click in front of the client.

Share Reports, including SoA, in a multi-media format.

Promote client understanding and education.

## Financial Mappers Pro<sup>CONNECT</sup> (2)

Financial Mappers provides the optional feature of sharing software with clients.

The Client can experiment with a copy of the plan. For example, “What happens if I save another \$100 a week”.

The client can generate their reports and plans and pass them back to the adviser for re-evaluation.

Collaborative planning builds long-term trusted relationships.

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### Financial Mappers Pro<sup>CONNECT\_Lite</sup> Clients (3)

Supply client with a 5-year planning tool.

This feature is ideal for Orphaned and Low Net Worth Clients and building relationships.

The client makes plans and generates plans or reports for sharing with the adviser.

An annual subscription model could include an online meeting and general plan discussion.

The Client asks for scaled or full-service advice when the need arises.

### Online Digital Advice – Financial Mappers Pro<sup>CONNEC\_Lite</sup> (4)

This product is used to generate income from demographics who does not require on-going advice. However, the opportunity may arise where these clients see the value in seeking additional advice for which they will pay your standard fees.

Your website would have a link to a page, where the person and register for a *Simple Statement of Advice for 5-years*. It may be that the person is asked to pay your fee in advance.

For the fee, the client will receive a *Statement of Advice* which excludes Insurance or specific Product Advice, 12-month access to Financial Mappers (Lite Connect Client) and an automated Financial Literacy Program. See additional information at end of document.

### Financial Mappers Lite for Marketing (5)

*Financial Mappers Lite* is ideal for preparing future clients with your financial education.

This product can be used as a stand-alone marketing tool.

The client makes a 5-year plan and generates reports with your white-labeled product.

The client reaches out when ready for advice.

For more information - [Financial Mappers LITE Resources](#).

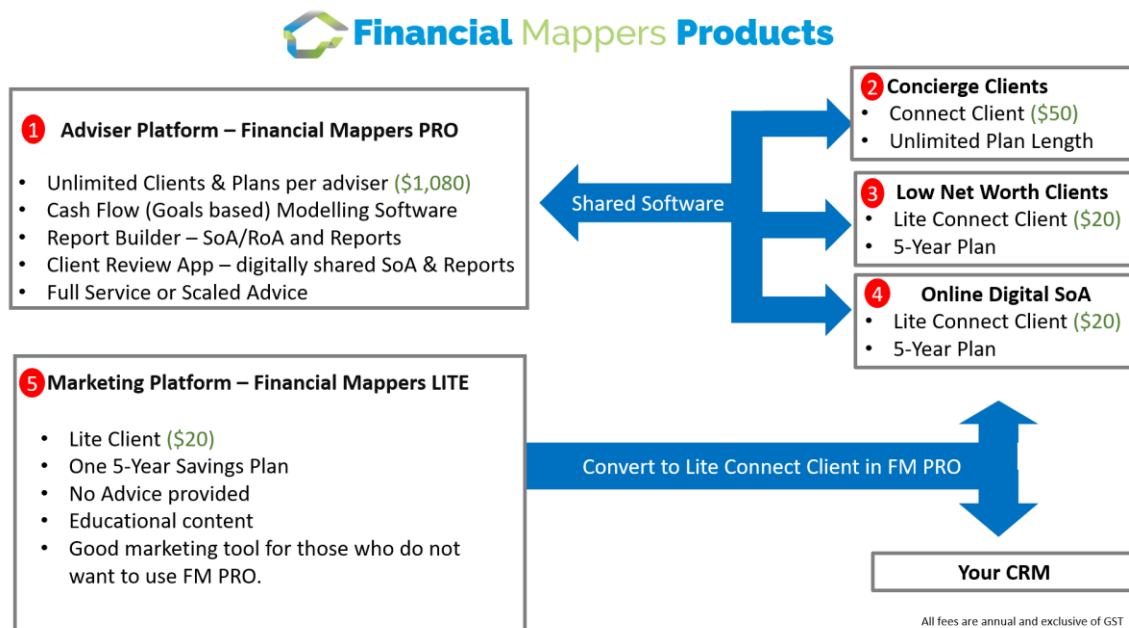
# Five ways Financial Mappers can help your practice

## Fees

All fees are exclusive of GST and are annual.

- PRO: Adviser License Fee: \$1,500 per adviser
- PRO: Paraplanner Fee: \$750
- PRO: Office Admin: No charge
- PRO: Connect Client: \$50
- PRO: Lite Connect Client: \$20
- LITE: Administrator fee: \$1,200 per platform
- LITE: Lite Client (FM Lite): \$20

*Advisers set their client fees appropriate to the services required by clients.*



### Special Note on cyber-security:

There is growing concern about the use of email to transfer sensitive information between client and adviser. Our software has developed a closed client portal where documents and plans can be shared, together with a Q&A section. To use this service, your client must be a Connect Client for which there is an extra fee.

Please read this article published 10 August 2022 - [The Death of Email and Why Advisers need to change for Security](#). (Chris Dastoor of Professional Planner)

### Financial Mappers – Online Digital Advice

Currently the Government and the Financial Services Council are working towards making the provision of affordable advice to all those seeking financial advice. At *Financial Mappers*, we believe we have the product to provide affordable advice to all NOW.

*Financial Mappers* has created a methodology where detailed information regarding a recommended plan, can be converted to text in a report. The report is generated automatically as soon as the adviser has completed the information in the three panels on the Objectives Chevron:

1. Objectives
2. Strategies
3. General Comments

We believe a 5-year plan, which does not include Insurance Advice or Product Advice can be generated in less than 30 minutes. Research seems to indicate consumers would pay between \$300 and \$500 for this advice. The cost from Financial Mappers is \$20.

This is how it works:

1. Consumer applies for *Financial Plan* and *Statement of Advice* by completing their name and email and pay the nominated fee online.
2. The Client is sent an email to register their account on your platform. In that email there will be a link to a customized video for your company where the process is explained.
3. The Client will be added to your automated Financial Literacy Program. *Financial Mappers* will provide a suggested set of emails.
4. Client completes the Mini-Fact in Financial Mappers. This information includes the sections *About Me and My Family* and the *Starting Position*.
5. The Adviser or Paraplanner imports the information into a plan.
6. The plan is created using Financial Mappers based on the client's nominated objectives that were nominated in the Mini-fact Find.
7. On the chevron, Objectives, the Objectives and Strategies are written, together with any General Comments, which may list exclusions to the advice given.
8. The Report can be automatically generated now.

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9. For a **Short Statement of Advice for 5-Years**, where no insurance or financial products advice is given, the report can be generated now.
10. The Adviser shares the plan with the client. Because all the advice is written on the chevron, Objectives, the client can return to these recommendations at any time. The client can create their own plans and generate any of the reports on the Reports Chevron.
11. The client can reach out for additional advice and pay the associated fees for service.

The company may have a scale of fees for this model based on additional services. For example, you may have the option for the client to pay for a half-hour zoom meeting regarding the plan.

For additional information read the Masterclass Document [Conversational SmartPanels – Report Automation](#).

### Contact

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As the designer of Financial Mappers, Glenis is the most suitable person to answer all your questions about Financial Mappers.

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