



# Financial Planning

We, at Quantum Support, pride ourselves on:

- Offering comprehensive support to Financial Planners.
- Providing back office support to Financial Planners.
- Enabling Financial Planners to focus on client service.

Through our systemised approach and documented processes, we are able to support Financial Planners in areas such as data entry, research support, processing applications and new business submissions. This allows the Planners to focus more of their time on providing exceptional service to their clients.

The Quantum Support team works closely with Financial Planners to help alleviate the administrative requirements in the financial planning advice process.

## Services

We have the ability to provide a range of support services such as research, quotes, data entry and Statement of Advice request forms. We can also provide a range of implementation services such as applications, paperwork support and application follow-up services.

We have provided you with a pricing schedule detailing the cost of each of our services and the Service Packages we offer.

## CONTACT US

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<b>PRICE SCHEDULE</b> <i>(All prices are inclusive of GST)</i>			
<b>Service</b>	<b>\$</b>	<b>Service</b>	<b>\$</b>
CRM Fact Find Entry <i>(entry of your Fact Find data into your CRM)</i>	\$110	Super Application <i>(Per super application form)</i>	\$55 Per application
Transcribing Meeting Notes <i>(typing your meeting notes into a file note)</i>	\$55	Investment Application <i>(Per investment application form)</i>	\$55 Per application
Investment Research <i>(Investment research report)</i>	\$55 Per client	Insurance Application <i>(Per insurance application form)</i>	\$55 Per application
Super Research <i>(Super research report)</i>	\$55 Per client	Application Follow-Up Service <i>(ringing companies to follow-up applications)</i>	\$110
Insurance Needs Analysis <i>(Needs analysis based on client's needs)</i>	\$55 Per client	CRM Document Upload <i>(uploading all documents to the CRM)</i>	\$55
Insurance Research <i>(Insurance research report per client)</i>	\$55 Per client	PDS Download <i>(downloading all required PDS documents)</i>	\$55
Insurance Quote <i>(Quotes completed to match needs analysis)</i>	\$55 Per client		
Insurance Quote (Off-Market) <i>(ringing insurers for quotes that are now off-market)</i>	\$55 Per client		
SOA Strategy File Note <i>(file note detailing the strategy for SOA)</i>	\$110		
<b>Package</b>	<b>\$</b>	<b>Package</b>	<b>\$</b>
Research Package <ul style="list-style-type: none"> <li>• Investment Research</li> <li>• Super Research</li> <li>• Insurance Needs Analysis</li> <li>• Insurance Research</li> <li>• Insurance Quote</li> </ul>	\$330	Implementation Package <ul style="list-style-type: none"> <li>• Super Applications</li> <li>• Investment Application</li> <li>• Application Follow-Up Service</li> <li>• CRM Document Upload</li> <li>• PDS Download</li> </ul>	\$330
Pre-SOA Package <ul style="list-style-type: none"> <li>• Investment Research</li> <li>• Super Research</li> <li>• Insurance Needs Analysis</li> <li>• Insurance Research</li> <li>• Insurance Quote</li> <li>• Existing Insurance Quote</li> <li>• Insurance Comparison Table</li> <li>• SOA Strategy File Note</li> <li>• BID Working Paper</li> </ul>	\$440	Pre-SOA and Implementation Package <ul style="list-style-type: none"> <li>• Investment Research</li> <li>• Super Research</li> <li>• Insurance Needs Analysis</li> <li>• Insurance Research</li> <li>• Insurance Quote</li> <li>• Super Applications</li> <li>• Investment Application</li> <li>• Application Follow-Up Service</li> <li>• CRM Document Upload</li> <li>• PDS Download</li> </ul>	\$660  <i>(Initial Payment of \$440 upon research)</i>