

## MLC Licensee Services - Risk Innovation Video Pod cast

### Topic: Licensee services for risk businesses



- Fiona Navarro  
MLC
- Hi I'm Fiona Navarro, National Manager for Protection advice for the MLC Licensees. Don't just look at the licensee services. Look at the businesses inside the licensee. In this video pod cast, we have a number of successful businesses in our network talking about what they value from the licensee group.
- Paul Rawson  
Finance Control
- The whole debates around the licensee issue should you be self licensed. Should you be part of a small boutique licensee or should you be with the large licensee. You cannot put a price on the scale that a big licensee brings you.
- Dennis Jones  
Beacon Wealth
- The Risk Specialist Network is fantastic. I think the intellectual property that has been brought together now to support advisers and help advisers to help their clients has been great.
- Gary O'Sullivan  
Blueleaf Consulting
- The introduction of the Risk Specialist Network enabled advisers who were operating in that risk space, to enhance their offering and to have a facility where they can upgrade their skill sets by what is being offered through the actual network itself.
- Rachel Martin  
Planning for Life
- The Risk Specialist Network, the value that they bring to our business at the moment is the wonderful support of people that can help us with whatever we need. Whether it's technical support, someone to help us with processes, with implementing tools and providing us with whatever resources we need to be successful in that area.
- Gary O'Sullivan
- The Risk Specialist Network was a great initiative by MLC. For far too long the area of risk insurance has, dare I say it, been regarded as a poor cousin to our investment colleagues
- Lena Ridley  
Batir Wealth
- The Risk Specialist Network provides our business with a safety net in terms of the accessibility we have to support in the technical areas around insurance advice. So just knowing that we're able to pick up the phone and get technical help.

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Mark McNeany  
Vertex Group

It's given me the confidence to sit down in front of business owners and understand what I'm talking about and help get to the bottom of what their needs are. As well as the tools and resources and the people in the network that are accessible to us. The Risk Specialist Network has helped us put in place processes to deliver a great insurance solution for our clients.

Matthew Read  
Monet Financial  
Solutions

The Risk Specialist Networks brought a lot of value to our business. They initially provided a quite intensive training programme in regard to business succession planning, structuring and the intricacies of a buy sell agreement. That was very beneficial.

I think that positioned us as being an expert in the area, differentiates us from other insurance advisers. Provides the basis from which to be able to work with the accountants and lawyers as well, along with the polish that they provided in terms of our procedures manual for the adviser to client process and a number of tools.

Michael Smith  
Pure Financial  
Management

The Risk Specialist Network is an integral part of our business and there wouldn't be a month that goes by, I would probably go as far as even saying, there wouldn't be a week that goes by that we're not tapping into the resources. Call it education, marketing and the technical assistance that they provide.

Jacob Waks  
Risk Protect

I think the value of the Risk Specialist Network is that it helps me put on more advisers which is my aim. I would like to put on quite a few more advisers and I still need to work in the business.

I still need to work on the day to day activities. I still need to see clients. What it does is, provides me with that support in the background.

Dennis Jones

I think it's that end to end process which is going to demystify the whole business growth and succession planning and risk management process for business owners.

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Jonathon Davis  
Davis Insurance

You can't underestimate the quality of information that is brought to hand at our sessions. But also, it's the bringing together of the other like-minded risk specialist advisers. You can't underestimate how much you can actually learn just even through osmosis in attending and being part of the Risk Specialist Network.

Peter Kirby  
Life Risk Management

They have really assisted and implemented a process into our business for the delivery of business succession advice. Also their technical workshop skills have been great.

Nicholas Sinclair  
Wealthfarm Financial  
Planners

The main part has been definitely been the involvement of the Risk Specialist Network actually building the processes. Being a holistic financial planning business, it's not something that we specialised and not necessarily knew all the ins and outs of what we should go through as part of the best practice processes, so having the risk specialist come into our business, build the processes with us, has definitely been something that's been extremely valuable.

Rachel Martin  
Planning for Life

The ability to able to attend a conference or workshop and be in the same room with some of these successful advisers.

Liam Diggin  
Mentor1

The assistance with accounting, well not particularly accountants but centres of influence and how to approach them and how to manage those relationships, I think have been fantastic.

Jonathon Davis

In terms of the peer forums and more specifically with the services that are on offer, there is no question that the technical prowess is excellent and that is certainly a resource and is quite valuable, particularly in the business market.

The legal panel of course is important, if you're advising in the business end of the market, you really need to be aware of when and where you need to call on the right legal support and introduce your clients or make them aware of their need to have legal advice.

The Risk Retreat is a fabulous event, again it just highlights the bringing together of people.

[end transcript]