

POLITIS

INVESTMENT STRATEGIES



Why Your Clients Want
Financial Planning Advice

**The value of financial planning
lies in the role it can play in the
lives of your clients.**

And that starts with money.



Money Matters

Little in our world can happen without money. It is also the number one cause of stress for Australians and the biggest cause of divorce.

It sits underneath common questions that people in their 50's have:
"Will I be ok?" ... "Do I have enough to retire on?"

It underpins parental worries about housing affordability for their children.

The kicker: those anxieties exist irrespective of household income.

But money **also enables choices**. It helps people achieve their goals and live the lifestyle they want.

It's why research from advised clients shows that:

***"90% of advised clients say that
accessing financial advice has left them
in a better position financially"*** ^[1]

Plans Give a Sense of Control

The quickest way to dial down anxiety is to give people a sense of control.

Making plans. A future focus on their goals. And concrete actions to achieve them, gives people a sense of control.

Plans takes their focus into what is possible and towards things they want. It gives a sense of progress.

It is hard to overstate the value of this.

Working with Experts gives Confidence

There are two aspects to this. Working and experts.

Plans are made at a fixed moment in time and the world is constantly changing. Markets, your client's circumstances and priorities are dynamic. So, their plans need to adjust.

Your role is to act as a sounding board. To support your clients and hold them accountable to their plans. It's one that is highly valued.

Expertise always provides reassurance. To have the Politis back-office support and investment teams to call on is reassuring for all of you.





It gives peace of mind

It Frees Up their Time

One of the biggest benefits of financial planning for clients is that it frees up time. To focus on other parts of their lives.

It is these factors that combine to create the value proposition of financial planning:

- ✓ A trusted advisor (you)
- ✓ A sense of control (the plan)
- ✓ Expertise (you & Politis)
- ✓ A sense of progress (goals being achieved)

And it Works

Numerous studies comparing advised and unadvised clients give clear results.

✓ **It makes your clients more money**

“A good advisor can add to (or save you from losing) 3% of your wealth per annum after fees & taxes.” ^[2]

“90% of advised clients say that accessing financial advice has left them in a better position financially.” ^[3]

✓ **Your clients feel better**

“89% of advised clients say it also provides them with improved mental health, less worry and stress, and better relationships with family and friends.” ^[4]

63% of unadvised clients thought it would give them greater control over their money” ^[5]

“64% of unadvised clients thought that it would give greater peace of mind.” ^[6]



“A good advisor can add to ... 3% of your wealth per annum after fees & taxes.” ^[7]



90% of advised clients say that accessing financial advice has left them in a better position financially ^[1]

Why You

As their accountant you are already their advisor and have an understanding about their financial situation.

It is simply about extending your duty of care to ask your clients about their personal financial situation.

About issues and concerns they might have and how you can help. It's just some questions and a chat.

Your clients will be grateful for it. Clients that had received financial advice reported a

“great deal of confidence in financial advisers.” ^[8]

It helps them.

The Opportunity

It's now.

The demand for advice has doubled in the past 5 years. ^[9] *Research from ASIC showed 41% of Australians intend to get advice in the near future.* ^[10]

People want to receive advice on:

- Planning for a happy retirement
- Where to invest surplus money or a windfall
- How to take control of their money
- Debt management
- Aged care for parents

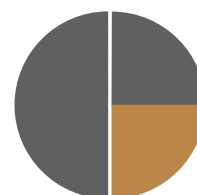
It makes them stickier.

Clients that receive accounting and personal financial advice are 3 times more likely to stay with you. You have become their trusted advisor about all the money issues in their lives.

As noted at the beginning, **money matters.**

Politis is Here to Help

Think of us as your ace in the hole. Your back-office experts that are here to support you and your advice business. Helping you help your clients with their personal finances.



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[1] "The True Value of Advice" Research Paper IOOF August 2020. One of the largest research projects of its undertaken in Australia. CoreData surveyed 12,643 advised clients and non-advised individuals [2] Research for Vanguard / Envest by PMC Quantitative Research Group [3] The True Value of Advice Research Paper IOOF August 2020 [4] The True Value of Advice Research Paper IOOF August 2020 [5] Fidelity International [6] Fidelity International [7] Research for Vanguard / Envest by PMC Quantitative Research Group [8] <https://riskinfo.com.au/news/2019/11/01/consumers-still-wary-of-financial-advice-report/> [9] <https://www.professionalplanner.com.au/2020/09/advice-demand-doubles-in-5-years> [10] "Financial Advice: What Consumers Really Think" Report 627 ASIC August 2019 [11] "The True Value of Advice" Research Paper IOOF August 2020. One of the largest research projects of its undertaken in Australia. CoreData surveyed 12,643 advised clients and non-advised individuals