

# Finance Broker Mentor

## Mentoring Program

**Backing New to Industry Finance Brokers for guaranteed  
success in the real world**

**FbM**

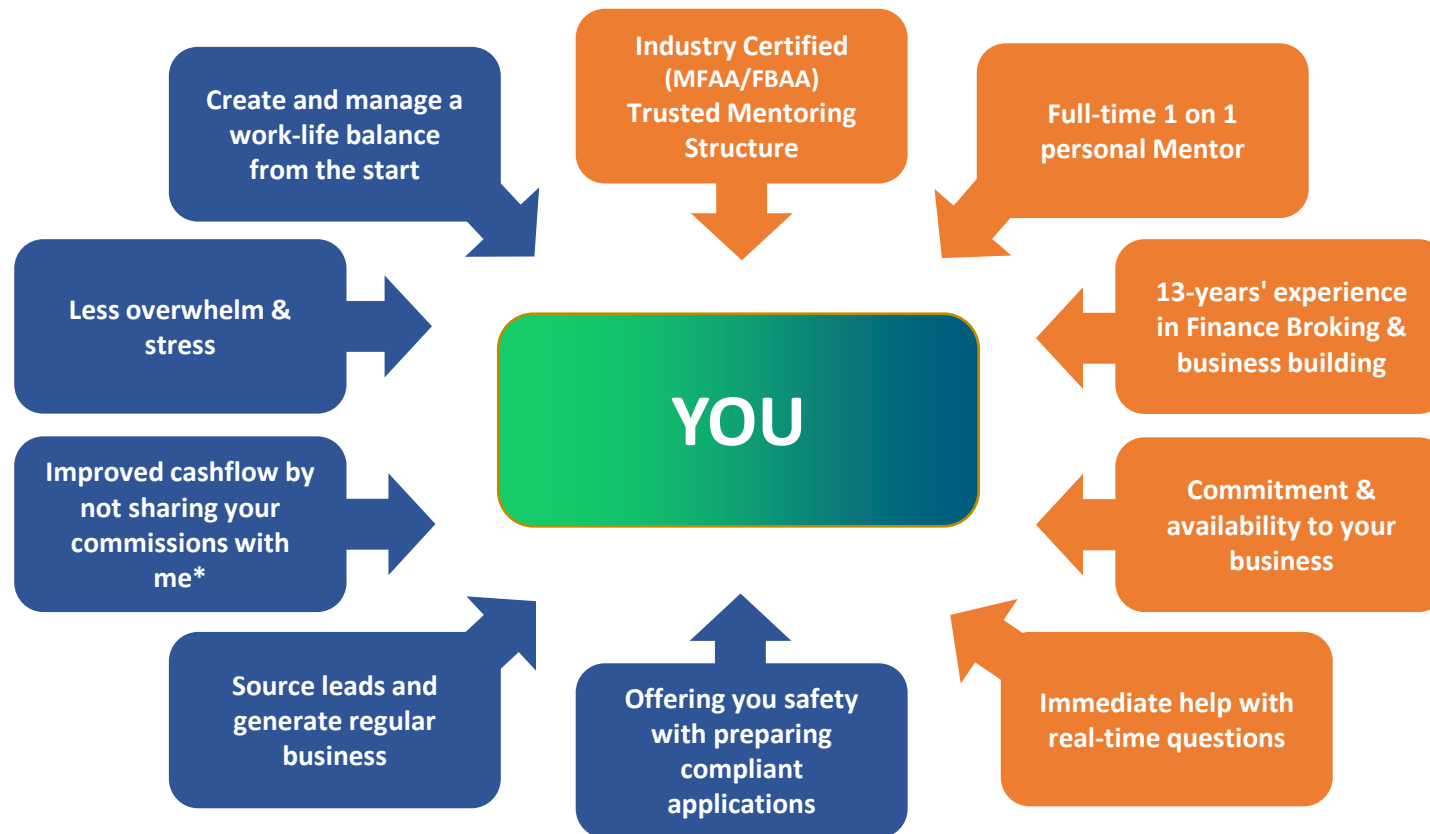
[www.financebrokermentor.com](http://www.financebrokermentor.com)

Copyright 2012-2020 ©

# Why?

Work Less & Achieve More

Certified Mentor & Full Member Of:



# Exclusive features of our program

- Expert industry lending & business modules with full human support
- **Weekly partnership calls** to check in on:
  - Previous weeks events and deals
  - Current Leads & Scenarios you have had come across your desk
  - Deals in your pipeline
  - Fast growth goals and business planning
- Unlimited contact in between for scenarios, assistance and advice
- Facebook/LinkedIn business page professional set up & optimisation **included**
- Heavily discounted professional website set up offers
- **Close your deals quicker** with our before submission Loan review service
- Access to our Group – **The Solo Broker**. Support in a collaborative environment
- Lender **“Mates not Rates”** sessions and guidance (get to know your lender, not just their interest rates)

# Benefits to you & your business

## Work For Yourself Not By Yourself

- **Understanding:** Guidance on the entire loan process, from finding leads through to post settlement activities
- **Learn quicker:** Hone technical skills for helping clients with easy-to-understand loan explanations
- **Money:** Manage cashflow by preparing and closing loans faster for quality customer outcomes
- **Less worries:** Simplify and master compliance so it becomes second nature. Be safe and secure
- **Supported:** Assistance and advice with scenarios and applications in weekly meetings and anytime in-between
- **Never alone:** Connect with industry experts and fellow New Brokers in FbM's exclusive group for networking & sharing valuable industry insights

# A snippet of the program's inclusions...

**Credit triage:** Know the key questions to ask prospective clients for better outcomes

**Structured scenarios:** Ensure a high success rate - learn how to give lenders the information they need when submitting a scenario.

**Best Interests Duty/Loan preparation kit:** Become confident in preparing compliant loan documentation with a comprehensive checklist of questions to ask and factors to consider for every type of scenario you may come across. Who has time to lose sleep wondering if you've missed something!

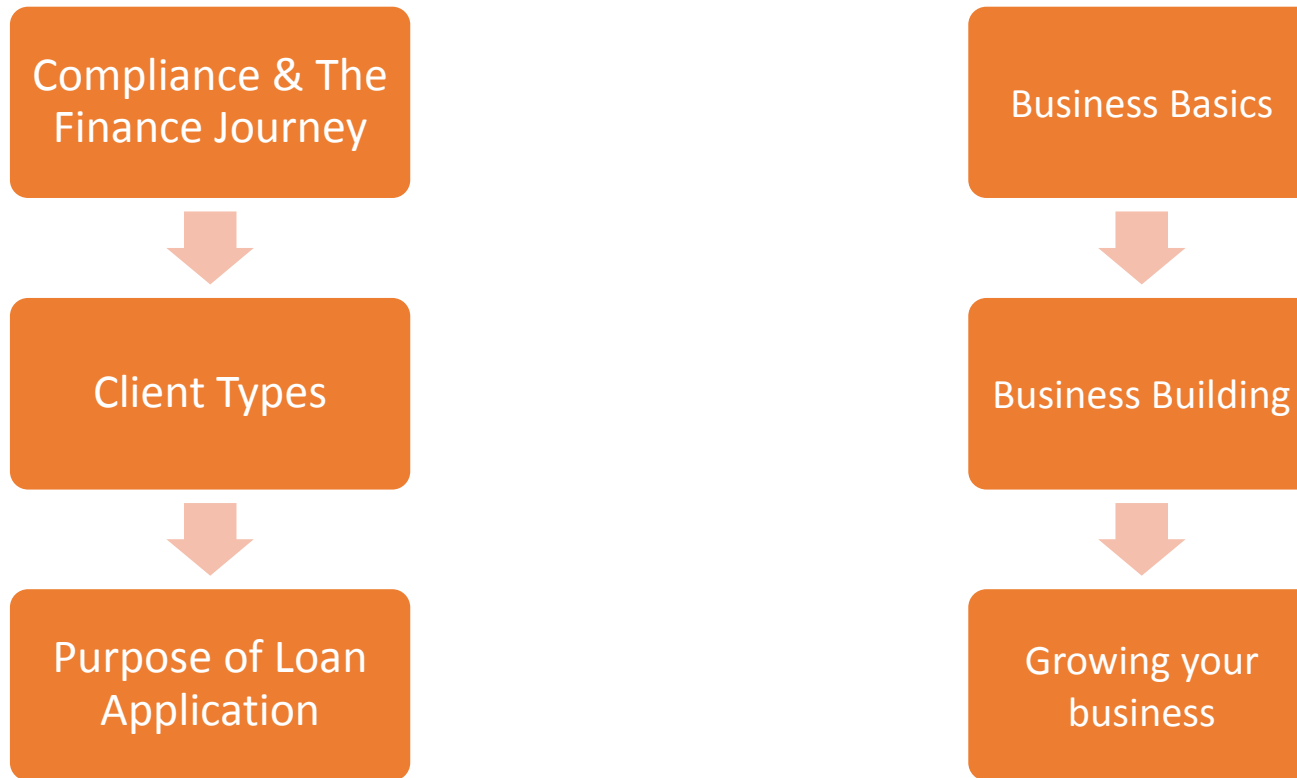
**Flowcharts & guides:** Complete flowchart and loan steps from first contact to Loan Settlement and beyond. Make the loan application process simple for you and your clients, never missing a client touch point.

**Loan Application coversheets:** Fully compliant and easy to follow. Let the Assessor know your plans and why they should approve the deal.

This is just the beginning - the FbM program provides support and guidance far beyond the bread and butter of broking.

# Mentoring: Lending & Business Modules

**Focus:** Mentoring Finance Brokers within their first 2 years in the industry



# Lending Modules

**Focus: Mentoring Finance Brokers within their first 2 years in the industry**

## **COMPLIANCE & THE FINANCE JOURNEY**

- Compliance
- The Finance Journey: Lead to Post Settlement

## **CLIENT TYPES**

- PAYG
- Self Employed

## **PURPOSE OF LOAN APPLICATION**

- First Home Buyer
- Refinance/Debt Consolidation
  - Investment
  - Land & Construction
  - Family Guarantee
  - Near Prime/Specialist
- Multiple Dwelling Developments
  - Bridging
- Self-Managed Super Fund
  - Overseas Borrowers
  - Business/Commercial

# Business & Marketing Modules

## BASICS

- Cashflow, Time Management & Planning, Database & CRM

## BUILDING

### You Your Customer & Sales Plan

- Vision, Mission, Values, USP
- Sales plan (Problem Solving/Objections)

### Promoting yourself

- Website, Social Media, Networking & Local Marketing, Referral Partners

## GROWING

- Client Relationship & Retention
- Bank Statement/Document Collection Services
- Outsourcing: Marketing & Loan Processing
  - Hiring a Broker, PA &/or Support Staff
  - Other services



## About Peter Ellis, the Finance Broker Mentor

I've been a Finance Broker for over 13 years and know the industry inside-out. I have personally experienced the highs and lows that came with carving out my own path. I've seen the pitfalls of inadequate Mentoring, and I know how working too much for too little damages our mental health.

In business there are a lot of unknowns that Brokers are forced to find out by themselves through years of trial and error. Why?

I had worked the massive hours preparing deals and placing scenarios, wasted hard-earned money and valuable time on numerous marketing campaigns, coaches, and courses...until one day, I finally realised that if I wanted to get anywhere, I needed to reach out and learn directly from those who were already where I wanted to be. This, I discovered, was a crucial yet so often overlooked step in building a successful broking career. **I invested in myself.**

So, after over a decade of success, I became a full-time Mentor. Now, it's my passion to back new Brokers entering the industry to build successful careers and avoid burnout from the unique challenges they may not be told about - but can often suffer from - when starting in the industry.

# Supported beyond just words

## Grow your business without worry

- **Sustained growth:** Support in sourcing leads and nurturing clients
- **Repeat business:** Strategies to build a strong loan book of loyal, long-term clients
- **Save time:** Tricky question? Don't dwell, I am here to help
- **Speedy responses:** No waiting days for return calls or email replies
- **Personalised:** One-on-one support, tailored to **your** business
- **Save money:** Flat fee mentoring. No commission sharing here
- **Exposure:** Don't waste time on marketing where you "spend and hope"

Certified Mentor & Full Member Of:



# What & How?

## What is needed to work with Peter?

- Laptop or Computer
- Reliable Internet connection
- Zoom account (I can help you set up)
- Google Drive or other secure Folder to hold the information we share
- A keen sense of learning

## How do I get started?

- Contact Peter Ellis via one of the below options to discuss your plans and future needs
  - Contact form on the website
  - 0413 435 763
  - [peter@financebrokermentor.com](mailto:peter@financebrokermentor.com)



**“Success comes when the level of support given meets  
the support needed”**

**Looking forward to helping you start and be part of your journey in  
this fantastic industry.**