

Finance broker Mentor

New To Industry Broker Mentoring Program

Including the Solo Broker Online Portal



About Peter Ellis, the Finance broker Mentor

I've been a Finance Broker for over 16 years. 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 know how working too much for too little damages our mental health.

In a Finance Broking career while there is **no easy path, LOTS of work to do and much to learn**, there are a lot of unknowns that Brokers are forced to find out by themselves through years of trial and error.

I had worked the massive hours preparing deals and placing scenarios, wasted hard-earned money and valuable time on numerous marketing campaigns 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 writing loans myself, I became a full-time Mentor helping new Brokers learn about the industry and build a business.

Regards

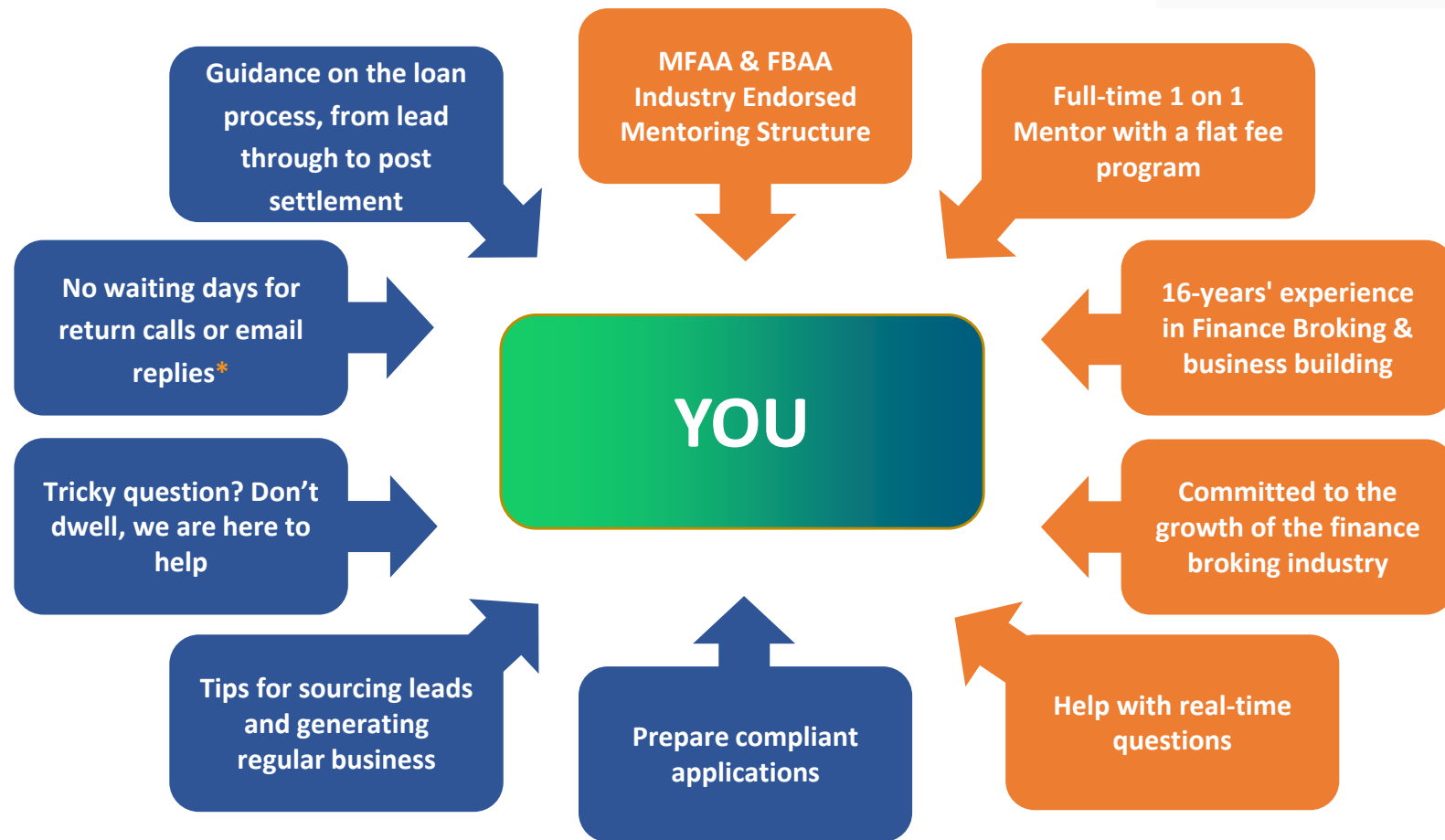
Pete



Supported

#answersnotanxiety

Certified Mentor & Full Member Of:



Finance broker Mentor: Mentoring program

- ☐ One-on-One partnership Zoom session/calls every six weeks to check in on:
 - ☐ Leads/scenarios you have had come across your desk
 - ☐ Help with deals in your pipeline
 - ☐ Business Growth strategies
- ☐ Contact in between partnership calls for scenarios & advice. Book a time on my Calendly app & let's learn.
- ☐ Submit your deals with confidence using the before submission loan review service*
- ☐ Access to the **Solo Broker Best Practice online portal** containing:
 - ☐ **Document and Compliance Checklists**
 - ☐ **Client questionnaires**
 - ☐ **Technical advice**
 - ☐ **Ask policy questions**
 - ☐ **The ability to submit scenarios**
 - ☐ **Client letter templates**
 - ☐ **Mentee community Plus, lots more**

Online Portal: Lending Modules



The Finance Journey

Get to know the step-by-step process of the Finance Journey from lead to post settlement!

[Click for the Finance Journey here >>](#)



Situation

The Fact find questions to ask when you receive a lead and the list of documents needed for an application!

[Click for Situation here >>](#)



Substantiate

Find out what to look for when reviewing documents and comparing them against the fact find!

[Click for Substantiate here >>](#)



Scenario/Purpose

Dig deeper to find out more about the questions, tips and points to be considered when working on a particular scenario!

[Click for Scenario/Purpose here >>](#)



Qualifying Criteria

Better understand the different Qualifying Criteria that Lenders consider when assessing a loan application!

[Click the Qualifying Criteria here >>](#)



Structuring/Service

Let's take a deep dive into Loan Structuring and Servicing, Loan types and finalising the loan application!

[Click for Structuring/Service here >>](#)



Submission

Know what to do next from loan submission through to settlement!

[Click for Submission here >>](#)



Service

The client service experience doesn't stop now the loan has settled! Lets get your clients referring others to you!

[Click for Service here >>](#)



Mentoring and Assessments

Show us how you are going with your Mentoring by completing these 8 assessment modules

[Click for Mentoring Assessments here >>](#)

Online Portal: Business & Marketing Modules



Business Plan/Goals

Do you have a Business/Marketing Plan?
How must we build a good business plan?
Find out here!

[Check the Business Plan/Goals here >>](#)



Promoting Yourself

The growth of a business happens
through client referrals and business
partners. Do you have an online
presence?

[Check Promoting Yourself here >>](#)



Hiring a Broker or Support Staff

Adding a new team member to your
business is for some a big move. What are
your considerations in getting a broker/
staff?

[Check Hiring a Broker/Support Staff here >>](#)



Other Services

Are you aware of the many other ways
that you can add revenue to your
business? See list ways to add extra
offerings (and revenue) to your business.

[Check Other Services here >>](#)

Online Portal: Resources & Broker Support



Mentor Calendar

Book a time to chat with your Mentor about a scenario or maybe go through some financials!

[BOOK HERE →](#)



Weekly Tips and Mindset

Are you overwhelmed or stuck on something in your business? Check out Pete's weekly tips to get you going!

[CLICK FOR TIPS AND MINDSET HERE →](#)



Mentee Growth Partners

Access to ancillary businesses that service the finance industry

[CLICK FOR MENTEE GROWTH PARTNERS HERE →](#)



Check a Policy

Can't work out which Lender will assist your client? Ask us!

[CHECK A POLICY HERE →](#)



Submit a Scenario

Need some help structuring a deal?

[SUBMIT A SCENARIO HERE →](#)



Community

Join your fellow Mentees in asking questions and learning more about this great industry.

[VISIT THE COMMUNITY HERE →](#)



Contact Us!

Having trouble with the portal? Want to leave feedback? or have a general question

[CONTACT SUPPORT HERE →](#)

Lending Modules

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

COMPLIANCE & THE FINANCE JOURNEY

- Our Partnership/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
- Overseas Borrowers
 - Bridging Finance
- Self-Managed Super Fund
- Multiple Dwelling & Developments
 - Business/Commercial
 - Asset & Other Finance

Business & Marketing Modules

- Business Plan/Time management
- Cashflow (Goals & Business volumes)
 - Promoting yourself:
 - You & Your Customer (Marketing materials)
 - Vision, Mission, Values & USP
 - Website
 - Social Media
 - Networking
 - Local Marketing
 - Referral Partners
 - Database & CRM (Long term client relationships)
- Outsourcing Marketing & Loan Processing
 - Hiring a Broker, PA &/or Support Staff

What current & former Mentees are saying...



Jack Fouracre

2 reviews



★★★★★ 4 months ago

Peter is a true gentlemen, Very generous with his time and expertise. I'll call him in a panic and having the worst day then he will break it down, preach about the importance of process and leave me feeling a little less anxious then I was. He has a true passion for helping people and I highly recommend him to any broker looking for a mentor.



Dave Harper

1 review



★★★★★ 9 months ago

If you are looking for a mentor you'll be hard pressed to find better than Pete Ellis! Pete has added great value and support to my business. He's a very genuine person, passionate about what he does and most importantly he cares about you and your business succeeding. Like any good mentor he knows his stuff but what you don't know from the outside is he is very generous with his time and goes above and beyond, regularly offering calls and VC's at an evening and on weekends to help your business keep moving forward. This is not a side gig for Pete, it's his bread and butter and he's 100% dedicated to you and your unique business and its needs. I highly recommend having a chat with Pete!



yingting lu

1 review



★★★★★ 4 months ago

Having work with Peter Ellis for more than three months, I feel so lucky to be able to work and study with such a professional and responsible mentor. With his patient guidance, my work efficiency has improved a lot. I highly recommend Peter Ellis to the brokers who are new to the industry and need guidance.

What current & former Mentees are saying...



Patrick Gregory

1 review

★★★★★ a month ago

Pete was my mentor as my finance broking business was being established and his support was absolutely critical to my business successfully establishing itself (now in it's third year). He patiently provided me with the detailed support & in-depth industry knowledge which enabled me to then go out into the market and deal with clients confidently. I would happily recommend any brokers seeking mentoring or support to get in contact with Pete.



Wayne King

1 review

★★★★★ a month ago

Whilst I'm new to mortgage broking I've been in business for about 40 years, the last 21 of those running my own Sales & Management Training company. I've met and coached thousands of people but rarely have I met anyone with Peters willingness to completely and utterly commit to me and my success. He's always available to me and goes what I consider to be way beyond what I might reasonably expect him to do to help me. He's an invaluable resource and has a wealth of knowledge. If you're fortunate enough to be able to utilize Peter, I would strongly recommend that you do just that.



Hugh Dellit

1 review

★★★★★ 3 months ago

I'm a broker with 4 years experience. Initially, I wondered how much value I'd get from this service given that I only occasionally come up against a scenario I'm unsure about.

I couldn't have been more wrong.

Engaging Peter has been the single best change I've made to my business this year. Having an experienced broker to bounce ideas off, not only about the technical elements of broking, but about your entire loan process is invaluable. My stress levels have dropped significantly since bringing Peter on board because I know that I've got a genuine broking weapon in my corner.

If you're a broker looking to take your business to the next level, just get this bloke on your side.

What current & former Mentees are saying...



Mohammed Jomaa

1 review



★★★★★ 2 months ago

I honestly cannot thank Peter enough for all his work and guidance! Being a new to industry broker can be daunting but having Peter at my side has alleviated a lot of the stress and self-doubt. He is always quick to respond to any questions, takes his time going through different loan scenarios with me and provides very thorough information about the entire loan process from start to finish which I am always referring to.

I highly recommend Peter if you are looking for a Mentor that will help you understand the finance journey but also how to build a successful business.



Michael Wu

4 reviews



★★★★★ 10 months ago

Peter is a dedicated mentor, and he has gone that extra mile to help me to workshop multiple complex self-employed scenarios that involve trusts.

I also benefit a lot from his creative ideas of getting business.

Highly recommended 🙌

What current & former Mentees are saying...



Justin Forbes

9 reviews

★★★★★ 5 months ago

If you're a new to industry broker and looking to work with a high quality and experienced mentor for your first two years then Peter Ellis is definitely someone you should speak to. Peter is an experienced finance professional who has more than 12 years working within the finance industry which he uses well to assist new to industry brokers during their first 2 years and beyond. In my dealings with Peter, I have found him to be extremely knowledgeable, quick to respond to queries via phone and emails and he is also willing to source answers through his extensive lender network. Peter has a genuine desire to work closely with new brokers to ensure they meet all their regulatory and compliance obligations as well as supporting brokers to increase their lending knowledge and loan processing efficiency. I highly recommend Peter and the mentoring services he provides.



Oliver O'Callaghan

1 review

★★★★★ 5 months ago

I was lucky enough to have Peter Ellis take over from a previous mentor towards the end of my first 2 years. At that stage I'd had 2 other mentors. I found Peter to be perfect for my needs as he cared about me and it wasn't just about increasing his client base for himself. After now having had 3 years broking experience I have met a lot of brokers and the consensus is that it is very difficult to find a good mentor who takes the time to help you 1 on 1 and be there when you need. I found a lot of the time I needed help at strange times of the day and Peter was always only too happy to help. In addition to helping new brokers I found that although I had some experience before working with Peter I wasn't aware that my structures and processes could be worked on. This job is all about structure and process and Peter is an expert at helping to make life a bit easier as a broker by coaching in these areas. I have no hesitation in recommending Peter for mentoring to other brokers both new and experienced and would be happy to take a phone call if anyone wants to discuss.

What is required to work with Peter?

- Laptop/Computer with webcam and internet connection
- Zoom account for partnership calls (Free version is fine)
- **Keen sense of learning and problem solving coupled with a strong determination to get out there and promote your business along with a commitment to put in the required time and effort to grow**

How do I get started?

- Contact Peter via:
 - The contact form on our website www.financebrokermentor.com
 - peter@financebrokermentor.com
 - 0413 435 763
- We can have a chat, discuss your plans, how the program works & the investment in self required
- If we are both happy to proceed, I will send you a **Mentee Expression of Interest** email link
- If your expression of interest is successful, I'll send you a copy of my agreement to sign & return
- Once your Aggregator sends you your Credit Rep Number (if not already held) we can start

***"I am here to be the "GPS", providing the direction while
you will be in the driver's seat.
I won't do it all for you, but I will support you"***

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

Regards

Pete

