

Advice Solutions for Accountants

~ *Designed by Accountants for Accountants*

Accounting Professionals **need** to be able to:

- Provide Advice on the establishment of SMSF
- Provide Insurance Advice or 'Replacement' Advice

Many Accountants also choose to:

- Provide or facilitate a full range of Financial Advice
- Provide Advice relating to Property & Finance (especially for SMSF)



The only problem is new and impending Legislation prohibits you

..... unless you have the appropriate qualifications and are covered by an AFSL and/or ACL.

This is Where the I-Financial Group can Assist

The I-Financial Group has developed a range of services to allow Accountants to facilitate all financial needs for their Clients in a professional and compliant manner. We can offer you the following services and support:

- Authorised Representative of I-Plan Financial Planning:
 - Provide Limited Advice concerning SMSF only
 - Provide SMSF & Insurance Advice
 - Provide Personal Advice (full Financial Advice)
- Seamless referral of those components that you don't wish to undertake personally, including:
 - SMSF Loans
 - Insurance
 - Property Advice
 - ***Where you maintain the Client Relationship and we fulfil the transaction.***

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