

SECURITOR ROLLS OUT SMSF ADVICE SOLUTION WITH ACCOUNTANTS

28th June 2012

For immediate release:

Securitor has commenced its training programs to FOFA ready accountants wishing to provide self-managed superannuation fund (SMSF) advice to their clients.

The training will empower accountants to take control of the future of their business and enhance the value their clients derive from their advice.

“With our support and guidance, accountants will have the ability to continue to provide SMSF strategic advice to their clients using our simple, compliant advice documents and tools,” said Managing Director of Securitor and Licensee Select Matt Englund.

The program follows the recent announcement made by the Minister for Financial Services and Superannuation, the Honourable Bill Shorten MP, that a new limited Australian Financial Services Licence (AFSL) would be available to accountants, allowing them to provide a broader range of financial advice.

To assist with the transition to the new licence, Securitor will provide accountants with simple, specialised training to help them become technically competent to meet the new legislative requirements.

“While we recognise accountants have highly specialised knowledge and relevant industry experience and training, they will need to be an authorised representative in order to continue to provide SMSF advice,” Mr Englund said.

The two training programs available to accountants are the *Accountants Offer* and the *Enhanced Accountants Offer*.

The *Accountants Offer* training program includes:

- A specialised education program enabling accountants to continue to provide advice;
- Recognition of previous studies and relevant continuing professional development where appropriate to provide exemptions (for example CPA, CA, SPAA); and
- Streamlined pathways to meet education requirements where there may be gaps.

A member of BT Financial Group

For media enquiries contact



Fiona Harris
Media relations Manager – Advice
BT Financial Group

Ph: 02 8253 6911

fiona.harris@btfinancialgroup.com

Accountants also receive free access to an extensive referral network of experienced and fully qualified Securitor financial adviser who offers a full range of financial services.

The *Enhanced Accountants Offer* is a more specialised program for accountants wishing to provide 'class of product' advice or financial advice that does not make a recommendation in form or in substance about a specific financial product.

Here accountants will be authorised to deal (or arrange to deal) in financial products only to the extent necessary to set up a SMSF. Advice can be provided around superannuation products, securities, simple managed investment schemes (as defined in the Corporations Regulations 2001), general and life insurance and basic deposit products.

About Securitor

- With its 26 year rich history, Securitor is one of the most established licensees in the country, with over 450 advisers and 240 practices in the network.
- Over 300 Securitor authorised representatives are accountants and six Securitor practices appear in the BRW Top 100 Accounting 2011 list.
- Securitor works on a partnership model where practices can come to the group with their own distinct value proposition and receive tailored services to support their business.
- Securitor is a proactive, agile licensee that adapts to industry change and evolving adviser needs.

For more information or interview requests, please contact:

Fiona Harris
Media relations manager – Advice
Ph: 8253 6911 or Mob 0418 237 544
Email: fiona.harris@BTFinancialgroup.com

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