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tapnz.co.nz

## We know what it takes to be an adviser.

We also know you didn't get into the industry to spend your days stuck behind a computer.

TAP gives you the opportunity to focus on providing a proactive value-adding service for better business outcomes.



“My systems, processes, client management and outbound email communications are pretty much on auto-pilot, which means I have more time for client meetings, preparing and giving advice - the stuff I should be focusing on. It's not an understatement to say joining was one of the best business decisions I've ever made. Now I have the time, the capacity, and the confidence for growth and/or an acquisition.”

**Regan Thomas, Money Tree**



“Stepping out on your own can feel overwhelming and scary - especially with the new compliance regime. The team at TAP have provided so much reassurance and comfort around this big decision for me and my family. TAP's team took the time to understand the DNA of my business and what I'm looking to achieve with clients, and then provided a framework of how things would work moving forward. TAP are truly a one-stop support hub who guide and support advisers.”

**Jeremy Thomas, JT KiwiSaver**

# Join The Adviser Platform

## Become a TAP Partner

### Benefits:

#### Purpose-built CRM

Customisable to your brand and your needs, our CRM was designed by advisers for advisers.



#### Seamless transition

Switching is easy - our experienced team will migrate your existing client data.



#### Everything in one place

No more spreadsheets or dusty files clogging up your workspace.



#### Squeaky-clean data

Target potential clients with sharper marketing strategies and increase the value of your business.



#### Be audit ready

Get all of your ducks in a row for all client notes, files and service overviews.



#### Get in the game

Turn leads into clients with our sales pipeline tools.



#### Your data is protected

We use the latest technology platforms to ensure total confidentiality.

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### Other member benefits include:



#### Client Review Calling



#### Quotemonster discount



#### Managed Client Engagement EDM



#### Blanket Referral Agreement: House, Car & Contents



#### Dispute Resolution Scheme



#### Professional Indemnity Scheme

# Add on Admin Support

Includes all TAP Partner benefits, plus:

## Grow your client base, not your admin team

A comprehensive admin support service from trained professionals that allows you to focus your time on growing your business



### The perfect match

Our support service matches your business requirements.



### Avoid admin headaches.

All data entry is handled by our specialist team to ensure accuracy and clarity.



### Handling and processing

We provide support across insurance, mortgage and KiwiSaver services.



### Sweep out your inbox

We'll manage your business emails, making sure the right emails get to the right person.



### Welcome an audit

Our comprehensive support and data management ensures your processes are clearly documented.



### Preparation for licensing

We'll help you get your house in order and ensure you're ready to transition.



### Turbo-charge your existing staff

Free up you and your team to focus on the clients, not the day to day admin.

Additional cost to add admin support is \$350 + GST per week.

## All partnerships include:



**No locked-in contracts**



**Regulatory guidance and support**



**No commission splits**



**Marketing and accounting services**