

Make it easy. Working with Wealth Market.

Provide extra value to your clients and
introduce them to Wealth Market services

The following tried and tested example scripts provide a base for you to introduce Wealth Market financial advisory services to all clients.

Wealth Market's aim is to provide personal tailored financial advice that can make a real difference to people's lives and help them reach their goals.

Working together as part of your team we can add value to your business and help to retain your client relationships. Together we can deliver broader, market leading services to clients.

Introduce Wealth Market and initiate referrals at the first meeting.

Wealth Market can assist you to meet your Duty of Care and compliance obligation by providing your clients with a personal review of their insurance and Protection needs to ensure they are adequately covered and able to service their debt. Wealth Market can also assist your clients with any other financial concerns and provide personal advice and implementation of tailored strategies for their current situation and goals.

Collateral is available for use with your prospects and clients including:

- Advisory Service brochures
- Financial Fitness Review pack
- Adviser Profiles

Introduce “Your Wealth Team” when you initially outline your loan application process to new clients.

“Part of the benefit of working with Loan Market, is that we’re able to give you access to other qualified professionals who work with us and help our clients. It’s just part of our service and the value that we’re able to give you.”

“My process includes – what I do for you, what our Customer Service Manager does, our Loan Writer, our Admin Team and our Wealth Team adviser”.

“We recommend that all of our clients meet with our Wealth Team adviser to ensure that you have adequate Protection in place. This is an important part of our duty of care to you and allows us to meet our compliance obligations around your ability to service the loan including in times of potential hardship, illness, death etc.”

“We can either organise this session now, or save it for later but it’s important we get to it by approval time”.

“As a valued client of Loan market our Wealth team adviser can also talk to you if you need any personal financial advice.” E.g. Budgeting, Cashflow & Savings, Superannuation, Investment Strategies etc.”

“There is no-obligation on you and we cover the costs of this session fully. If you end up wanting to do something after the session with the adviser, that’s entirely your call.”

“Most of our clients get a lot out of this and it could be one of the most valuable sessions you ever have.”

How to deal with common objections from clients?

Common client objections to obtaining insurance and Protection advice include – “I’ve already got Protection, I’ve got it in Super, I’m not that interested, I have a Financial Planner”.

Refer “Your Wealth Team” to meet your Duty of Care and Protection compliance obligations to ensure clients are adequately covered and are able to service their debt.

OBJECTION – “I’ve already got Protection”

“It’s great that you already have Protection insurance however we need to ensure that it’s the right level of cover to support your loan and your lifestyle, particularly in times of hardship.”

“Our Wealth Team adviser will be able to work out pretty quickly whether you’ve got the right level of cover for you and your family.”

“There are compliance obligations we’ve got to meet and we want to ensure our clients are looked after and in the best possible position.”

“Our adviser can work out whether there’s a better and more cost efficient way to structure your cover – which helps when you’re trying to maximize your cash flow to pay off your debt.”

“The session will be worth your time and it won’t cost you anything, we’ll cover the cost of this for you.”

OBJECTION – “I already have a Financial Planner”

“That’s great that you have a planner however we’d still like you to meet with our Wealth team adviser to ensure that you are covered from a compliance perspective and it allows us to meet our obligations to you.”

“You can take this opportunity to have a broader discussion with our Wealth team adviser to compare some things relative to the advice you’re already receiving from your planner.”

“This session is complimentary and there is no obligation to you to take it further.”