

Aon's accountant offer

Aon Hewitt Financial Advice offers a solution for accountants looking to provide advice on SMSFs after the accountants' exemption ceases on 1 July 2016



Available options

Aon Hewitt Financial Advice (AHFA) has produced a tailor-made licensing offer for accountants to help you meet your licensing requirements. You can choose from one of three options to become an Authorised Representative of AHFA. Contact us for more information about which option is right for you.

1

Essential SMSF

\$6,000*

You are limited to providing advice to establish, retain or wind up a SMSF and factual information on other superannuation matters.

2

Strategic SMSF

\$7,500*

You are able to provide advice to establish, retain or wind up a SMSF as well as personal advice on other superannuation areas such as contributions, pensions and insurance. You are able to provide class of product advice, but not specific product recommendations.

3

Full authorisation

You are able to provide holistic financial planning and product advice.

* The fee is for one authorisation. Additional authorisations with the same practice will be discounted by \$2,000 per individual. All fees are exclusive of GST.

Support we provide to you under all three options

- ✓ Professional development (education and training)
- ✓ Templates for advice documentation and strategy
- ✓ Access to referral arrangements (financial planning, debt, estate planning, product)
- ✓ Technical and research support
- ✓ Account manager (first point of contact)
- ✓ Compliance consulting

Why partner with AHFA?



We are not integrated with a bank or other product provider and we do not require advisers to promote or prioritise the use of our products to their clients. This enables you to focus on what you do best, providing strategic advice. As such, we are perfectly placed to provide a solution that meets your needs.

Being part of Aon plc, a global business that is focussed on risk mitigation, we are proud of our strong compliance culture. Through ongoing training and support we will ensure that you are aware of your obligations and have the resources available to meet them. This allows you to continue to provide the same services and advice as you are currently, in a safe, risk mitigated environment. We can also support and guide you if you wish to broaden your advice offering.

Our philosophy is to help our advisers become their clients' Trusted Adviser, enabling us to provide you with a truly unique proposition that encompasses far more than just AFSL licensing. With AHFA being part of the broader Aon, you will have access to a broad range of services and solutions to meet not only your needs, but also those of your clients.

Aon Risk Solutions and People Risk are part of Aon plc and allow you to generate additional income through referral fees that are payable on completed referred business opportunities (dependent upon your business model).

Aon Risk Solutions

Aon Risk Solutions is the global risk management business of Aon plc, and the worldwide leader in risk advice and insurance broking. With over 28,000 colleagues in 120 countries, you and your clients will benefit from our teams who can help develop and implement tailored solutions that take into consideration your clients' specific risk, commercial and general insurance needs to help them achieve their financial and specific objectives.

People Risk

Another area of expertise we offer is in people risk. A significant impact on the profitability of many Australian SMEs is the ability to identify and address their specific people risk exposure encompassing workers' compensation, employee benefits (group life and salary continuance schemes) and workplace health and safety (OH&S). You are able to add value to your client relationships by referring your clients to our People Risk team who are able to provide a tailored solution to address your clients' specific people risk exposures.



We're here
to help

Change is a constant variable in the business world and with the changes in legislative requirements, you need to ensure that you partner with an organisation that understands your business model and can provide the appropriate solution to mitigate your risk.

For more information about how we can assist you please contact us on **02 9253 8308** or email us at aonhewittfinancialadvice.au@aonhewitt.com.

About Aon Hewitt

Part of Aon plc, Aon Hewitt is the global leader in human resource consulting and outsourcing solutions. Our services focus on helping organisations mitigate risk in their workforce and realise the untapped potential of their employees. We also help individuals maximise their wealth to enable people to live the life they want.

In Australia, our team of experts partner with your organisation to develop and deliver people strategies that achieve positive business outcomes in the areas of: superannuation and retirement; financial advice; workers' compensation; work, health and safety; workforce risk solutions; employee benefits; talent, leadership and employee engagement; remuneration and incentives; total rewards; actuarial services; and mergers and acquisitions.

With more than 30,000 professionals in 90 countries, Aon Hewitt makes the world a better place to work for clients and their employees.

Aon Hewitt is the global talent, retirement and health solutions business of Aon plc.

For more information on Aon Hewitt, please visit aonhewitt.com.au.