



Successful

Training

Partnership

**Associated
Advisory
Practices**

Associated Advisory Practices

Adviser

Testimonials

Don't just take our word for it ...



Ownership

Networking

Growth

Skills

Support



Successful



Read what our existing advisers say about us...

"We joined Associated Advisory Practices (AAP) from the commencement of the organisation in 2006, and as a small independently owned practice (four advisers, four support staff), we have found the experience invaluable so far. When first made aware of what AAP was offering we felt it seemed too good to be true, and that there must be some catch such as an obligation to use specific products.

After having been members for some time we can now say that there are no strings attached and the services are exactly as they are stated.

We sincerely believe that being a member of AAP combines the best of both worlds, in that we are able to be in control of our own destiny by being an independently owned and operated practice, whilst at the same time having access to the educational, business building, compliance support and financial benefits usually only afforded to larger institutionally owned organisations.

We believe that being a member of AAP will continue to significantly benefit our business growth and more importantly our bottom line and profitability. The services made available to us as AAP members are unique in that no other organisation offers the back-office services of Australia's largest independently owned financial planning group to individually owned practices without having "strings attached".

The fact that we can also pick and choose which services we wish to use, without being dictated to as to how to run our businesses, is what made the decision to join the AAP a "no-brainer" once we were introduced to the membership benefits.

We benefit from access to subsidised annual offshore conferences, skill sharing opportunities with our peers, free compliance audits, free compliance and technical support, free professional development training sessions and the opportunity to own shares in the biggest dealer group in the country. We also benefit from the skills and friendly personal service of a very capable and supportive AAP staff that are placed at our disposal.

Should you be running your own practice already or contemplating doing so we recommend you check out the services offered by AAP."

Barry Crabtree

Managing Director

Financial Advisory Services Pty Ltd

"Portfolio Managers attended the inaugural presentation of AAP in 2006 and joined AAP shortly after. Since joining AAP, we have utilised many facets of the AAP business model, including marketing and compliance.

We have been impressed with the assistance provided by AAP/PIS staff in developing and growing our business. We intend to continue to utilise the many and varied services offered by AAP and would recommend any independently owned dealer groups consider membership with AAP seriously."

Paul Hewins

Director

Portfolio Managers Pty Ltd



Partnership





Networking



“Joining AAP has been without question the most worthwhile partnership we have undertaken since getting our own AFSL. The infrastructure and support AAP makes available has assisted us with our marketing, compliance, research, PI and numerous other little bits and pieces that have saved us not only money but time. Not once have any of these services or support been forced on us, in fact the opposite – it is there if you need it, in our case whilst I didn’t think we really needed it I am glad we have taken advantage of it as our business is better because we have.

I am also highly impressed with the staff within the AAP/PIS Group. They are friendly, helpful, hard working and unquestionably have the growth and success of my business at heart when dealing with them – the structure of AAP is such that both parties benefit from this. I have no hesitation in recommending AAP to any AFSL holder who is not a part of a larger dealer group.”

David Harrison

Director / Representative

Money Options

“Maintaining your own AFSL can provide a lot of satisfaction, but ultimately you are a small fish in the ocean of the financial services industry. Joining AAP has given us an opportunity to tap into the resources of not only one of the biggest but the best in the industry.

The AAP offering covers everything from compliance and marketing to assistance with HR, and is supported by a team that is knowledgeable and enthusiastic about their role in providing us with the tools to grow our business. Ultimately the choice is ours as to how much or how little we want to implement, but we have quickly learnt that their suggestions result in time saved and an improvement to the bottom line.

The networking opportunities that AAP give us to liaise with peers operating businesses similar to our own are also invaluable. I would highly recommend anyone operating their own AFSL to look at the value joining AAP can add to their business; they will not be disappointed.”

Amanda Ritchie

Financial Planner

Pinnacle Financial Planning

“When we were first approached about joining AAP my immediate reaction was the same reaction that I have to any approach where a fund manager or a large dealer group in some way want to enter into an arrangement with our business i.e. one of suspicion and mistrust. At the time I was looking at a number of offerings to small AFSL holders and ended up with a shortlist of three, of which AAP was one. After a lot of thought and research I finally decided on going with AAP.

After joining with AAP, I have to say that my skepticism was misplaced. AAP has met my expectations in regards to all of the positives that I saw and never realised any of the concerns that I had. I am certainly happy with the decision and while it will be reviewed as part of our corporate governance, I would not expect to change any time soon.”

Jacqueline Parker

Director / Representative

HN Financial Partners Pty Ltd



Ownership



Training





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