

Adviser Marketplace



Compare products and services to discover the best choice for you and your clients.



**Adviser
Ratings**



Contents

Letter from our CEO	3
Introducing the Adviser Marketplace	4
How it Works	5
1. Advisers provide feedback	6
2. After a short window of time	7
3. Once we have all the ingredients	8
FAQ	9
Next Steps	10

'Which is the best and most cost effective product/service for my clients and my practice'?

Without a doubt, this is the most common question I hear from financial advisers. As CEO of Adviser Ratings, I'm often involved in conversations around where advice is headed, and the problems advisers are experiencing. And while the number of problems keeps rising, I haven't seen as many solutions.

I've watched the dramatic shift in licensed advisers moving away from aligned to private (formerly independent) over the last few years, and the dramatic impact this has had on the industry. And with this level of systemic shift in licensees, large scale changes must evolve in line. Or to put simply, how advisers choose the products and services that make up their eco-system needs a complete overhaul.

With very little available to help advisers make these decisions, we've created a central place to review and compare products and services to learn about what is in the market. To learn what vendors provide the best products, at the best price, with the best reputation.

It's called the Adviser Marketplace, and I'm very excited to say it's only months away from being launched. In the meantime, we need your help. There's no point in launching a marketplace with all the functionality in the world, if no feedback has been collected.

So we are opening the ability to provide feedback this month and once we've had the chance to organise the responses, the new Adviser Marketplace will be released shortly thereafter. We've put a lot on the line to provide advisers with something we see as the most helpful initiative to emerge for advisers in a long time. And all we need is for you to provide honest feedback.

For five years, consumers have provided feedback on advisers. I'm very happy to now put the power in your hands, and provide a mechanism for you to give feedback on the products and services you use. I hope it provides you as much value as I expect it to.



A handwritten signature in black ink that reads "Mark Hoven".

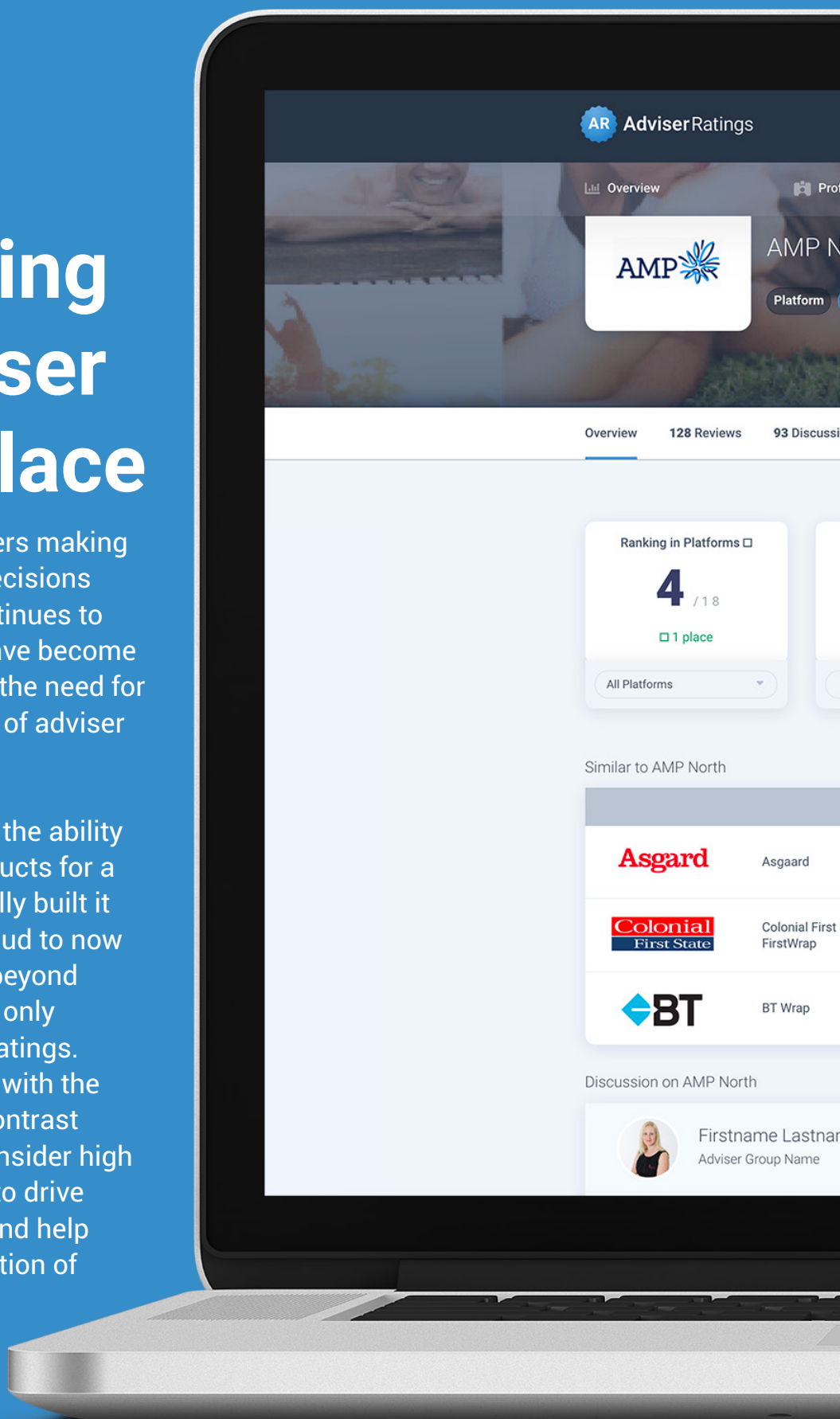
Mark Hoven, CEO



Introducing the Adviser Marketplace

The trend towards advisers making independent business decisions on service providers continues to grow. And as advisers have become empowered with choice, the need for a dedicated marketplace of adviser opinions has emerged.

Advisers have requested the ability to ask questions on products for a long time, and we've finally built it for them. We are very proud to now expand our capabilities beyond advisers being limited to only receiving feedback and ratings. We're providing advisers with the ability to compare and contrast vendors on what they consider high quality conduct in order to drive better client outcomes, and help restore the public perception of financial services.



HOW IT WORKS

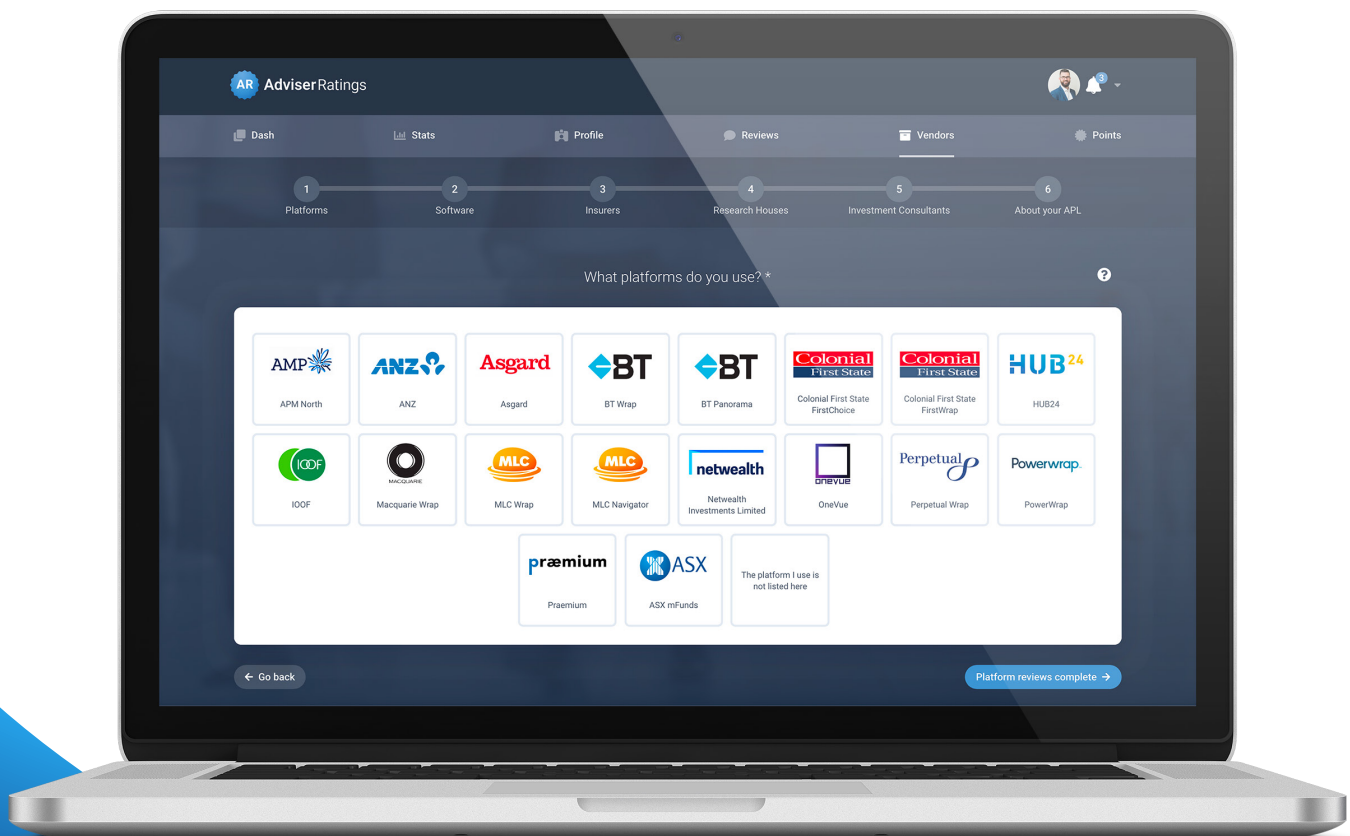
- 1) Advisers provide feedback
- 2) Adviser Ratings data team cleanses and turns feedback into insights
- 3) Launch of Adviser Marketplace to search, compare, and review products and services





1. Advisers provide feedback

The first arm of the platform is released. Here, advisers can start the process of crowd sourcing comparable insights by quickly providing feedback.





2. After a short window of time

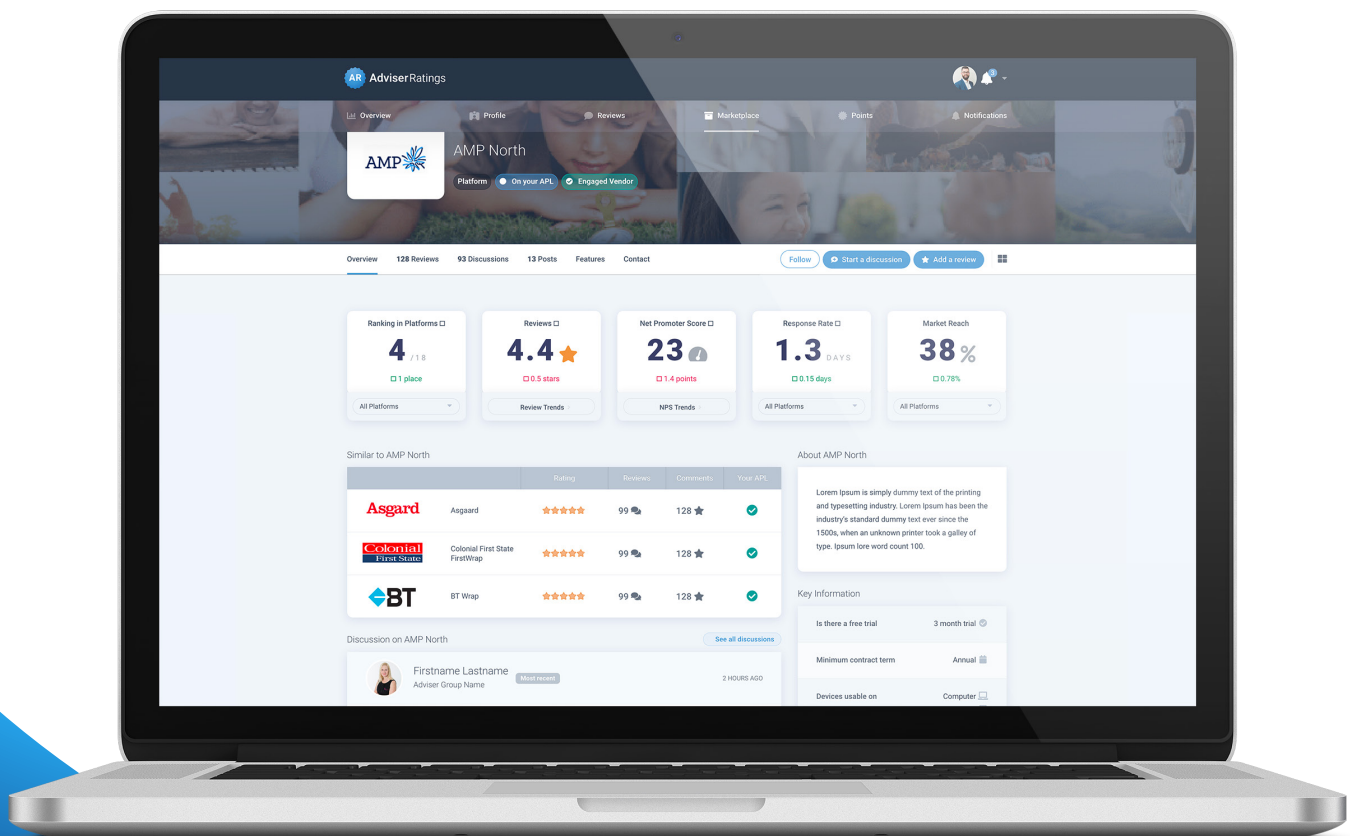
Feedback will be closed and our data scientists will cleanse and sort the data. This will be combined with data from the product and service PDS guides to create searchable and comparable data points.





3. Once we have all the ingredients

We will launch the Adviser Marketplace, providing advisers the chance to survey the entire landscape of options for the first time. Here advisers can compare and contrast products and services to discover the best options for the best price.



FAQ

Why are you building this?

Our goal has always been to help the financial advice market grow via increased transparency. With such a strong focus on improved conduct after the Royal Commission, providing a central place for advisers to provide feedback on products and services was an easy step for us to take.

How much will this cost?

Providing feedback and comparing products and services is something all advisers can engage with for free. While we do have paid subscription options, all advisers will be able to participate in this new environment.

When does it launch?

The first of three tranches of the launch is set for May. We expect the collection and organisation of the feedback to occur over June, and a fully functioning comparison feature to be live in August-September.

How long will the feedback window be open?

We will take on feedback over the course of two weeks once we are live.

What categories are going to be involved?

We are launching with what most advisers would consider the most important: i) Platforms, ii) Insurance, iii) Software, iv) Research.

How long will it take to partake?

Advisers have let us know this only takes around 5-6 minutes to complete.

Who can provide the feedback?

We will email all licensed financial advisers a private link where you can provide feedback for the first tranche of the launch.



Jessica Brady: In an ever evolving world its great to have a central place where Advisers can share their insights on tools and products available in the market. This means I can go to one location to discover what changes we should be considering within our business! It also is peer reviewed so I can see candid and frank commentary – saving me time and money!



Ray Jaramis

The opportunity to learn from everyone else's experiences? A no brainer!

I imagine it'd feel like having a guardian angel on your shoulder nudging you towards making a better call.

Next Steps

Learn more about the upcoming Adviser Marketplace by getting in touch with us.



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Contact us today

■ For more information:
adviserratings.com.au