


#INC2019

You've got to fight for the right to survive in SMSF!

Olivia Long, Managing Director – Strategy & Operations, Prime Financial Group
 Karen Dezdjek, Director – Superannuation & Wealth, Prime Financial Group



#INC2019



Olivia Long


Olivia Long is a Management Veteran with over 20 years' experience in management roles within the financial services sector. Former CEO & Director of an SMSF Administrator, Olivia has had over 14 years within the SMSF sector and now heads up strategy and operations for national financial services and advisory firm Prime Financial Group's wealth management and super division.

Prime Financial Group Ltd is an ASX Listed Integrated Accounting, Wealth Management and Capital advisory firm with joint venture relationships with over 30 accounting practices nationally.

Olivia is responsible for the ongoing development and delivery of the firm's products and services, as well as driving its marketing and public relations activity.



#INC2019




Karen Dezdjek

Karen is a certified practicing accountant, an SMSF Specialist Adviser (SSA), has completed the certificate in Self Managed Superannuation through the University of Adelaide and has completed the RG146 qualification.

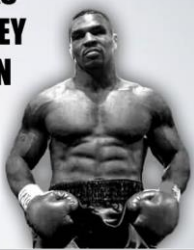
Karen has over 20 years experience in the accounting industry enjoying the past 10 years specialising in self managed superannuation.

Karen has in-depth experience in dealing with a spectrum of clients and advisory firms in relation to their specific superannuation administration and compliance requirements.



#INC2019 


**“EVERYBODY HAS
A PLAN UNTIL THEY
GET PUNCHED IN
THE FACE”**



- MIKE TYSON

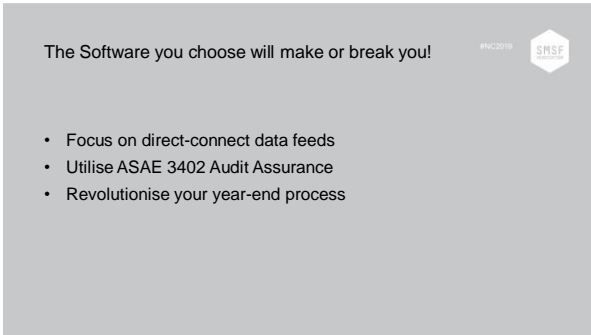
#INC2019 

**DECIDE THAT
YOU WANT IT AND
GO FOR IT.**

It's time to change your business model #INC2019 

- Annual processing doesn't cut it anymore
- Change your focus to obtaining data
- Move to periodic processing
- Adopt a Limited Power of Attorney







Create volume efficiencies and do things in bulk!



- Period processing enables you to leverage off the bulk processing capabilities of your software
- Do something once that impacts over a hundred times
- Think PROJECT not just PROCESS



It's all about your clients...



- Embrace mobile phone technology
- Use technology to manage your queries
- Make working with you easy!



Embrace Digital Signing!

- A complete game changer
- Transform your client experience
- Enhance security around data
- Utilise workflow tools for efficiency

#INC2019 SMSP



It's time to talk \$\$\$

#INC2019



- Revise your billing methodology
- Price your services at market
- Move to direct debit
- Take control of your Debtors



#INC2019



Consider Outsourcing

#INC2019



- Ask around – word of mouth is the most powerful way of reference checking prospects
- Whatever you do – move to a periodic processing model – forget annual accounts

To summarise

#NC2019

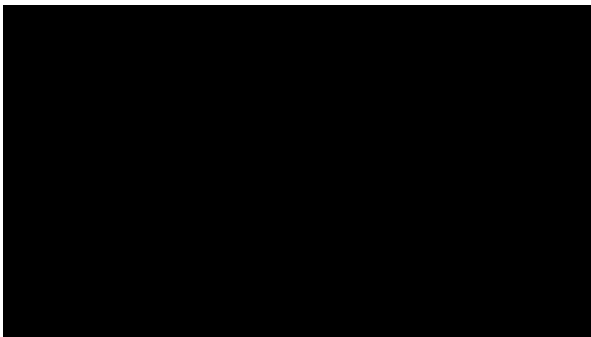


- TBAR is just the beginning – it's time for change
- Maintain a focus on obtaining data
- ASAE 3402 is key
- Do something once that impacts over a hundred times
- Think Project not Process
- Embrace digital signing
- Move to a Debtor free environment
- You don't know what you don't know



#NC2019





Disclaimer

#INC2019



This presentation has been prepared by Primestock Securities Ltd. AFSL 239 180. The information on this presentation is of general nature only and is not intended to be a definitive statement of the matter described. It has been prepared without taking in to account your personal objectives, financial situation or needs. It should not be relied upon as a substitute for financial or other specialist advice. Before making any decisions on the basis of this video you should consider meeting the appropriate professionals or one of our advisers prior to making any decisions. The relevant product disclosure statements should also be obtained and considered before making a decision about any financial product(s). The information contained in this presentation is current as at today. We have made every effort to ensure the accuracy of the information contained in this video. Primestock Securities Ltd., its offices, employees and agents disclaim all liability except any liability that by law cannot be excluded for any error or inaccuracy of the information contained in this presentation or any loss or damage suffered by any person directly or indirectly by relying on this presentation.
