



moneyGPS®

Video Transcript

George Haramis – CEO & Co-Founder – moneyGPS was established to provide all Australians with accessible and affordable digitally supported personal financial advice.

If the client wants to, they can undertake the whole process. There's a fully client-led journey and they don't need to discuss anything with a financial planner.

We can now bridge the advice affordability gap in Australia and allow people to access affordable advice any time of day or night, which is, of course, fully compliant.

But the advice offered to individuals can start as low as just under \$100. It covers both superannuation and non-superannuation topics. And as part of the process, we undertake a strategic review of the client's circumstances.

We provide product recommendations. Where appropriate, we also provide digital implementation or if the client would like to, they can speak to one of our GPS coaches, real humans that can help them along the way.





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Video Transcript (Cont.)

George Haramis – CEO & Co-Founder (Cont.) – From an accounts point of view, this is terrific because they can finally embed into their practise a fully compliant, complete professional financial planning service without the need to be licensed with us providing full support every step of the way.

For an AFSL or a large advisory group, they can now look after their clients who can't at the moment afford their traditional financial planning services.

We can engage with their assistance, educate the clients and triage the clients at the right time when they need comprehensive financial advice to their financial planner.

With technology, we're now your best friend to help you look after clients that can't yet afford your traditional services.

Aaron Williamson – Head of Product – Our subscriber firms can actually white label the platform as well, meaning they can have their own branding, their own logo, so it's a bit more familiar for their clients. They can also have their own service providers, so things like lending partners or insurance partners that they might already have.





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Video Transcript (Cont.)

Grace Rando – GPS Coach – We are here to ensure that you fully understand how the moneyGPS platform works and your subscription plan. All you need to do is simply book in an online Zoom meeting with one of our GPS coaches and we will help you every step of the way. As part of our role, a GPS coach will liaise directly with your clients who have purchased digital advice documents or factual reports.

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