



The Process

We have devised forms and procedures which we believe would make the outsourcing of your paraplanning services a smoother process. Below are the steps to be taken.

A - You complete the Paraplanning Request and Strategy Guidelines and scan the documents listed in the Document Checklist. Make sure you click on F1 on each Section to confirm what documents are required.

B - You email us the above documentation at plans@paraplanningdirect.com.au

C - We will send you an email on the same day acknowledging receipt of the Job Request.

D - Within 48 hours we will review the job request. We will confirm via email the costs of the job, expected date of completion and any other information that we may require

E - We will send you a draft for approval within our turnaround time.

F - Within one day of your approval, we will complete the document and send it to your compliance department for vetting, if required.

G - We will make any changes required by vetting within 24 hours.

H - Once vetting has approved the document, we will invoice you for the job.