

## Your LaVista Team

Even if you have your own AFSL, the complexity of running a business and being a Responsible Manager can be very time consuming. Many advisers feel hamstrung by their current licensing arrangements.

Many of the advice professionals we speak to are keen to embrace a different structure and approach but they don't know if they can make it on their own.

With LaVista, you're never alone.

You may run a boutique AFSL but you can access the resources and expertise of a large one with LaVista.

Whether you're still deciding to get your own licence, you're in the middle of the process or you've been running your own licence for years, we can help you.

LaVista offers a range of tools and services to help you confidently implement your business strategy. Don't get bogged down in compliance, software, administration and red tape when you can hit the ground running.

Joining the LaVista community will give you access to expert knowledge and service that can help get you started and manage your licence.



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\*Based on the 2018 CoreData Licensee Report

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Whether you have an AFSL or are looking to apply, we can provide the flexibility, control and support to keep you compliant and profitable.

[lavista.com.au](http://lavista.com.au)

## Managing your AFSL shouldn't mean less time with your clients

If you want a partner who will assist you to keep on top of your obligations as a Responsible Manager, and help you to manage your day to day compliance, advice and monitoring, LaVista Licensee Solutions can help.

We offer comprehensive licensing services that you can select to suit your unique needs, circumstances and budget.

We can take the pressure off you and your staff, leaving you more time with clients. And let's face it, that's what it's all about.

## Your licence, powered by LaVista

If you already run your own AFSL or you are thinking about applying for one, LaVista Licensee Solutions is here to help.

You've made the decision to back yourself; now find the right team to back you.

LaVista lets you select the services you need, whether it's just the basics or the more sophisticated tools you need to really maximise efficiency in your business.

## Get me started



Getting your own licence is a big decision but once you have weighed up the pros and cons and decided to take the plunge, you'll need to go through the application process.

Applying for an AFSL and dealing directly with the regulator can be daunting but that shouldn't put you off.

Our experienced team can give you an estimate of the time and cost required to obtain an AFSL and guide you through the process to get you up and running as quickly as possible.

## Manage my licence



Having your own licence means having the freedom to run your own business model, but it also comes with a raft of new obligations which can take you away from growing your business. We can help you hit the ground running with the practical tools you need for your AFSL, so you have more time to focus on helping clients.

Our foundation licensee services package gives you the most commonly needed AFSL tools, and you can upgrade with extension services for maximum efficiency.

With our core services, you have the tools you need and more importantly, someone to talk to about the day-to-day challenges of running a licence.

## How we can help



### Governance & compliance

- Licensee standards
- Responsible Manager obligations
- Advice documentation
- Adviser and AFSL audits
- Registers & compliance templates



### Community network

- Peer-to-peer network
- Conferences
- PD days
- HR support



### Research

- LaVista research
- External research
- Investment committee
- Approved Product List



### Technical support

- Legislative updates
- Regulation & industry changes
- Technical updates
- Client newsletters



### Software

- Workflow management
- Revenue management & reporting
- In-house help hotline
- Discounts