

## Menu of Strategi support services

The TripleA Advisers Association has a strategic partnership with Strategi and sister company, Strategi Institute for the delivery of a range of support services covering CPD & training, compliance and general adviser business support.

	CPD & Training	Triple A pricing (+ GST)	Description
1	CPD annual guide	Free	Everything an advisers needs to know to meet CPD requirements. Includes guidance and helpful templates for professional development plan and CPD log.
2	CPDplus online learning platform	\$340 per annum	This is a complete online CPD solution using the Strategi 'Radar' education portal. This can be your complete communication solution. It contains a chat room facility, compliance portal and hosts all the CPD modules which are completed on line and automatically marked and recorded on the adviser CPD log.
3	National Certificate in Financial Services (financial advice level 5)	See Strategi Institute: <a href="http://www.strategi.ac.nz">www.strategi.ac.nz</a>	Online, distance learning and classroom based courses in all standard sets. TripleA members also receive SOA templates, client interfacing software / calculators and a free DNA Behaviour communication assessment. These tools make you more effective in your role as a financial adviser.

	Compliance	Triple A pricing (+ GST)	Description
1	Key legislation, regulation and Code Handbook	\$36	Your complete guide to all the legislation, regulation, code and FMA guidance notes for everyday use and also to prepare for the NCFS (5) examination.
2.	AML / CFT manual and templates	\$380	A complete end-to-end AML/CFT solution including a training manual, guidance and templates to meet your obligations. Specially negotiated price for Triple A. Normal retail is \$475.
3	AML / CFT audits	\$900	Limited assurance audit for both risk assessment and AML / CFT programme. Includes special checking facility by Strategi Institute prior to the Strategi auditor commencing the audits.
4	Compliance reviews	<b>See Strategi: <a href="http://strategi.co.nz">strategi.co.nz</a></b>	Strategi has a range of compliance reviews to meet the needs of both RFAs and AFAs. Most common review packages are SystemsCheck for AFAs and RFACheck Lite for RFAs.

	Business support	Triple A pricing (+ GST)	Description
1	Business Operations Manual	\$370	A must have for most adviser businesses. Contains heaps of templates for the development of business systems, processes, agreements etc saving thousands of dollars in time.
2	Writing stylebook	\$30	An electronic publication providing valuable tips on how to produce professional publications.
3	Professional Practices Handbook	\$70	An electronic manual which covers all aspects of best practice for financial advisers.
4	Professional Practices templates	\$370	A complete template series for the advice process - including SOAs.
5	<a href="#">Business advice and development assistance</a> to advisers.	Project / hourly rate as applicable	<ul style="list-style-type: none"> <li>• ABS, certification and development of compliance systems.</li> <li>• Develop model portfolios, investment solutions and investment policy statements.</li> <li>• Business structure and succession advice.</li> <li>• <a href="#">Practice valuations</a> and conducting independent due diligence on adviser practices for buyers or sellers.</li> <li>• <a href="#">Preparing businesses for sale, merger or acquisition.</a></li> <li>• <a href="#">Marketing campaigns</a> for investment and risk advisers.</li> <li>• Training and development of front end reporting for users of wrap platforms and CRM solutions.</li> </ul>

If you have any queries about these services please contact David Rey, [drey@strategi.co.nz](mailto:drey@strategi.co.nz) or email your enquiry through [www.strategi.co.nz](http://www.strategi.co.nz)