

# The Mortgage Academy

As the industry leader in the training and professional development of the next generation of mortgage brokers, The Mortgage Academy's Mentor Program suits:

- New entrants yet to commence their Certificate IV/Diploma of Financial Services (*Finance/Mortgage Broking Management*)
- New entrants that have recently completed their Certificate IV/Diploma of Financial Services (*Finance/Mortgage Broking Management*)
- Mortgage Brokers with less than 2 years experience that require Transfer of Mentorship
- Mortgage Brokers of less than 2 years experience that require Transfer of Mentorship and Certificate IV upgrade to FNS50504 by 30 June 2012



**The ONLY Nationally recognized Mentor Program**

# The Mortgage Academy Mentor Program

**This Mentor Program is one of the most comprehensive, well-rounded HOW TO Programs in the market.**

It has been designed to ensure that new entrants to the industry will have the structure and ongoing support they need to successfully achieve their goals.

Incorporating **ALL** the key elements of Industry Compliance, Business Planning, Loan Products, Lending Structures, Marketing Strategies, Business Development and Financial Selling Skills, the Program combines both “classroom” and “in the field” learning environments to deliver consistent, measurable, high performance results that really matter.

## **Participants will learn how to:**

- Achieve their industry and lender accreditations
- Write and review their own Mortgage Broking Business Plan
- Establish scaleable Business Systems and Support Structures
- Market and Promote their Business
- Research, Compare and Explain different Home Loan Products
- Conduct Home Loan Interviews
- Write Home Loans
- Cross sell complimentary products and services
- Manage client records
- Stay in contact and service their clients ongoing financial needs

## **Participants will be fully supported over the 2 years with:**

- Mentor Program Workbooks and Manuals
- Monthly Workshop Sessions
- Specially dedicated Lender Workshops
- Expert Presenter Workshops on Business Development Strategies
- Their own monthly electronic Broker newsletter for the first 6 months
- Brokerpedia online access for the first 12 months
- Hundreds of downloadable Tools, Checklists, and Tips
- Assistance with loan scenarios
- Assistance preparing for their home loan interviews
- Assistance preparing loan submissions
- Validation of their first 12 loan applications prior to submission to the lender
- Ongoing phone and email access to their dedicated Mentor

## Mapped to Advanced Diploma level

The Mortgage Academy Mentor Program has been mapped to FNS60104 Advanced Diploma of Financial Services.

The first 12 months of the program will be undertaking the Advanced Diploma. For eligible mentees the cost for the first 12 months will be only \$995 per person. Many mentor programs charge approximately \$5,000 per annum and are not nationally recognised, so this is definitely the most cost-effective and way of building a successful career in Mortgage Broking.

Subject areas include:

- Introduction to Customer Service and Sales
- Sales and Marketing strategy and implementation
- Direct Marketing
- Business Practices
- Promoting Financial Literacy
- Practice Management
- Preparing for Licensing

Those that enroll in the 12 months will be awarded an Advanced Diploma of Financial Services upon successful completion of their 1st 12 months.

## Real Value for Money

The Mortgage Academy values its Program at over \$120,000 for the 2 years:

- Over 120 hours of scheduled, face-to-face, small group Mentor Workshops
- Over 1,200 additional hours of allocated mentor support time via phone and email
- 2 dedicated Business Building Workshops with Specialist Guest Presenters each year
- 2 dedicated Specialist Lending Forums with a Panel of Lender Representatives each year
- 3 months online mortgage broking software access
- 12 months online Brokerpedia access
- Design and creation of your own client e.newsletter
- 6 months electronic distribution of your e.newsletter to your client database
- Materials, tools, templates, workbooks

# Mentor Program Overview

## The First Year

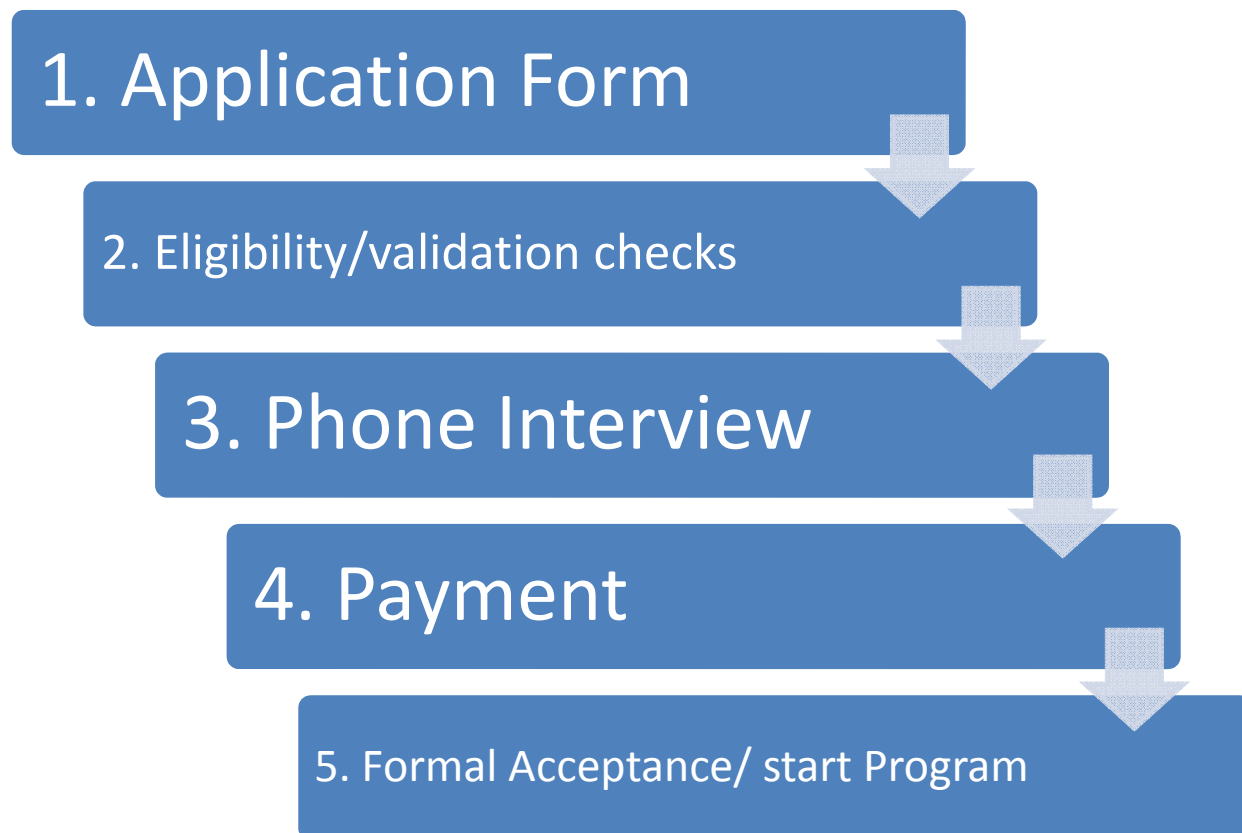


# Mentor Program Overview

## The Final Year



## The Joining Process



### Eligibility/Validation Checks

Documents “not held” will form part of the Program Pre-Conditions included in the Formal Acceptance letter and will need to be produced within 3 months of commencement of the Program.

Held	Not Held	Type of Document
		Certificate IV/Diploma of Financial Services (Mortgage Broking)
		National Police Criminal Check (3 months)
		Credit Check (3 months)
		Professional Indemnity Insurance Certificate
		COSL Membership
		MFAA Online Compliance Pack Completion Certificate (201-A)
		Certified copy photo ID
		Resume
		ACL Contact details