

MFAA Mentor Profile



Mentor Profile Details

Full Name:	
Business Name:	
Office Location/s:	
Aggregator:	
Phone:	
Email:	
Website:	

Additional Mentor Information

**Years Practicing
as a Broker:**

**Qualifications
(Lending,
Mentoring,
Coaching, Other):**

**Program
Structure/Outline
(If running own
program):**

Trusted Adviser Mentoring Mentoring Program Outline

Rather than any specific course, the program is very flexible and designed to meet the individual learning needs of each participant.

Participants will learn how to:

- Obtain industry and lender accreditations
- Meet ongoing educational requirements (Continuing Professional Development)
- Write a Mortgage Broking Business Plan
- Set up Business Systems and Support Structures
- Manage issues and queries regarding business management, lending and finance broking
- Prospect and Promote their Business
- Research, Compare and Explain Home Loan Options
- Conduct Finance Interviews
- Write Home Loans & Asset Finance

Participants will receive all the support they need:

- Access hundreds of downloadable tools, checklists, and tips
- Participation in our monthly Workshops
- Participation in our other events
- We help them prepare for their finance interviews
- We check their home loan applications for compliance
- Advice on all aspects of compliance and risk including but not limited to AML/CTF, Know Your Customer and NCCP
- Membership of our closed Facebook group
- Access to their Mentor Monday-Saturday from 8am to 8pm (face to face, phone, email, Zoom or Teamviewer)

An initial 1 on 1, face to face meeting at the Mentees workplace is designed to ensure they are correctly set up for success. This may be done via a Zoom meeting if the Mentee is interstate.

This is followed by monthly Professional Development Days with no more than 12 Mentees in a group. These days include a guest speaker (not usually a lender) as well as a current topic from me and an "Around The Grounds" report from each Mentee telling us what has happened in the previous month and any challenges or learnings they have had. Scenarios are also discussed at this time.