

MFAA Mentor Profile



Mentor Profile Details

Full Name:	Peter Ellis
Business Name:	Free From Financial Worries Pty Ltd T/A Financebrokermentor.com
Office Location/s:	Suite 5, Level 1, 11 John Street, Pakenham, Vic, 3810 (assisting Finance Brokers Australia Wide)
Aggregator:	Specialist Finance Group
Phone:	0413 435 763
Email:	peter@financebrokermentor.com
Website:	www.financebrokermentor.com

Additional Mentor Information

Years Practicing as a Broker:

14 Years

Qualifications (Lending, Mentoring, Coaching, Other):

- Diploma in Finance/Mortgage Broking Management
- MFAA Industry Certified Mentor
- Cert 3 in Retail Operations

Program Structure/Outline (If running own program):

SUPPORTING SOLO BROKERS

Working one-on-one, allowing you to fully utilise my current industry knowledge with the ability to learn at your own pace and promptly receive feedback along the way. Growing a successful and compliant brokerage without overwhelm.

Modules Overview:

- Compliance & The Finance Journey
- Client Types
- Purpose of Loan Applications
- Business Basics
- Business Building
- Growing Your Business

Monthly partnership calls to discuss your business growth plans, lending & marketing modules & the industry in general.

Contact in between these monthly sessions for any scenarios, policy questions, loan structuring & advice.

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Mentor Style (Local or Remote):

- Remote via ZOOM, sharescreen, phone and email
- Australia Wide service

Service Commitment: (Availability, Query turnaround times e.g. 24/7)

- 9am to 6pm Monday to Friday AEST
- 11am to 4pm Saturdays AEST
- Quick replies to SMS
- Responses to email scenarios and phone messages within 4 business hours
- Responses to Loan Reviews within 36 business hours

Payment Structure/Options if applicable:

- FLAT FEE MENTORING
- I do not request commission splits from settled loans be shared with me
 - Monthly payment option via Xero Invoicing
 - Once off set up and administration fee

Additional Comments and/or Services:

PROGRAM FEATURES

Monthly Partnership calls/Zoom sessions to discuss:

- Current Leads & Scenarios you have had come across your desk
- Progress of your current plans/goals in your business
- Module slides & assignments are shared via Drive
- Review of your First 12 loans before submission
- Scenarios/Loan Policy & Lender structuring support in between monthly catch ups

BENEFITS TO YOU AND YOUR BUSINESS

- Stress Relief: You will have access to your own personal Mentor who knows YOUR business and fully supports you in building it. Benefit from my 14 years of current Finance Broking/compliance knowledge & business building experience.
- Time savings: You will be out seeing the next client for your business sooner as there will be less of your time spent in the office researching, structuring & preparing deals.
- Money Savings: Time is money and from experience we know that the cost of the mentoring will be far outweighed by the above stress relief and time savings as you will learn quicker and benefit from our unique strategies.
- Self/Family: The whole reason you are in business is to enjoy life and the free time that is available by working your own hours. Let me be your trusted partner that allows you to take that time off and not hold it over for another day