

# Finance Broker Mentor

## New To Industry Broker Mentoring Program

**Backing New to Industry Finance Brokers for success in  
their own business**

The logo consists of the letters 'FbM' in a bold, white, sans-serif font, centered within a solid blue rectangular background.

[www.financebrokermentor.com](http://www.financebrokermentor.com)

Copyright Lending Mate Holdings 2012-2021 ©

# Why?

Work Less & Achieve More

Certified Mentor & Full Member Of:



## Exclusive features of our program

- Expert industry lending & business modules with full human support
- **40-minute Fortnightly partnership calls** to check in on:
  - Current Leads & Scenarios you have had come across your desk
  - Deals in your pipeline
  - Growth goals and business planning
- Contact via email, call or online links for scenarios, assistance, and advice
- **Submit your deals with confidence** with our before submission loan review service
- Access to our Group – **The Solo Broker**. Support in a collaborative environment

# Benefits to you & your business

## Work For Yourself Not By Yourself

- **Understanding:** Guidance on the entire loan process, from finding leads through to post settlement activities
- **Learn quicker:** Hone technical skills for helping clients with easy-to-understand loan explanations
- **Money:** Manage cashflow by preparing and closing loans faster for quality customer outcomes
- **Less worries:** Simplify and master compliance so it becomes second nature. Be safe and secure
- **Supported:** Assistance and advice with scenarios and applications
- **Never alone:** Connect with industry experts and fellow New Brokers in FbM's exclusive group for networking & sharing valuable industry insights

## A snippet of the program's inclusions...

**Credit triage:** Know the key questions to ask prospective clients for better outcomes

**Structured scenarios:** Ensure a high success rate - learn how to give lenders the information they need when submitting a scenario.

**Best Interests Duty/Loan preparation kit:** Become confident in preparing compliant loan documentation with a comprehensive checklist of questions to ask and factors to consider for every type of scenario you may come across. Who has time to lose sleep wondering if you've missed something!

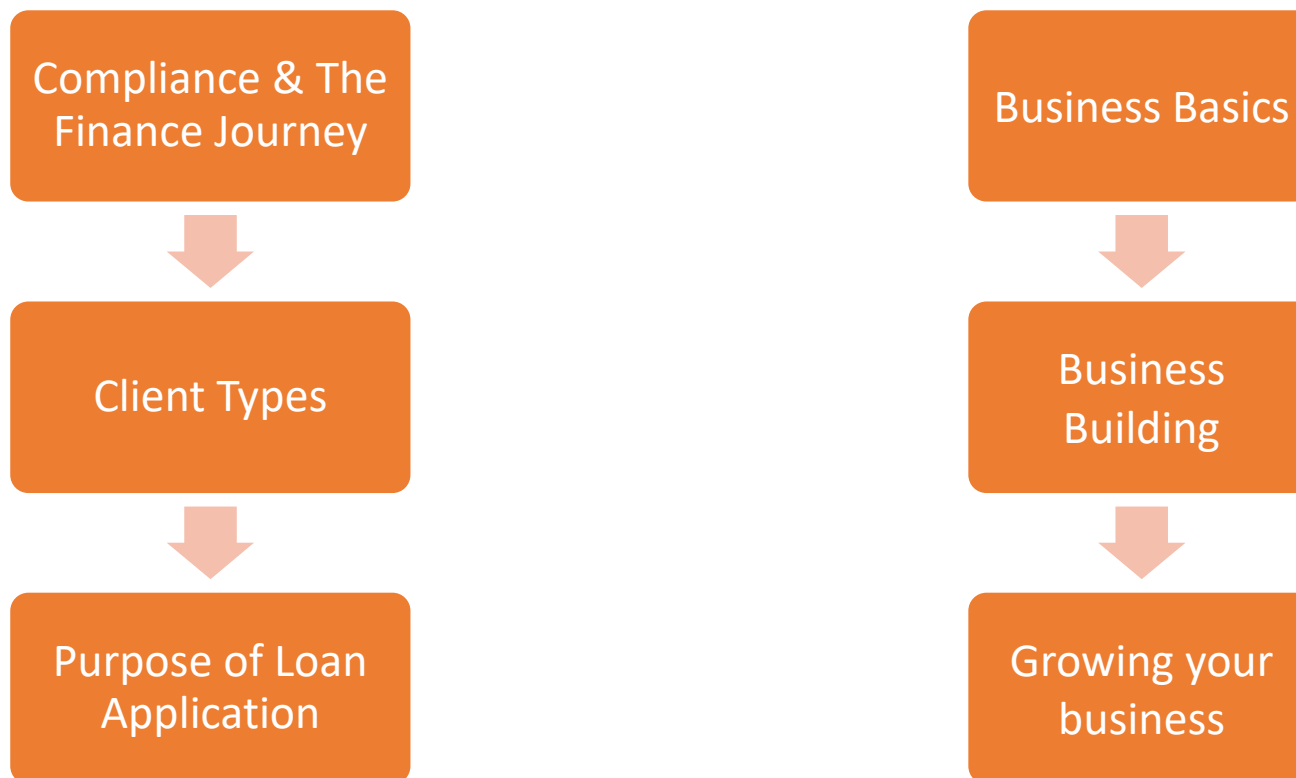
**Flowcharts & guides:** Complete flowchart and loan steps from first contact to Loan Settlement and beyond. Make the loan application process simple for you and your clients, never missing a client touch point.

**Loan Application coversheets:** Let the Assessor know your plans and why they should approve the deal.

The FbM program provides support and guidance far beyond the bread and butter of broking.

# Mentoring: Lending & Business Modules

**Focus:** Mentoring Finance Brokers within their first 2 years in the industry



# Lending Modules

**Focus: Mentoring Finance Brokers within their first 2 years in the industry**

## COMPLIANCE & THE FINANCE JOURNEY

- Our Partnership/Compliance
- The Finance Journey: Lead to Post Settlement

## CLIENT TYPES

- PAYG
- Self Employed

## PURPOSE OF LOAN APPLICATION

- First Home Buyer
- Refinance/Debt Consolidation
  - Investment
  - Land & Construction
  - Family Guarantee
- Near Prime/Specialist
  - Overseas Borrowers
    - Bridging Finance
  - Self-Managed Super Fund
- Multiple Dwelling & Developments
  - Business/Commercial

# Business & Marketing Modules

## BASICS

- Cashflow (Goals & Business volumes)
- Business plan and time management
- Database & CRM (Long term client relationships)

## BUILDING

### You & Your Customer

- Vision, Mission, Values, USP

### Promoting yourself

- Website, Social Media, Networking & Local Marketing, Referral Partners

## GROWING

- Outsourcing: Marketing & Loan Processing
  - Hiring a Broker, PA &/or Support Staff
    - Other services



# About Peter Ellis, the Finance Broker Mentor

I've been a Finance Broker for over 13 years and know the industry inside-out. I have personally experienced the highs and lows that came with carving out my own path. I've seen the pitfalls of inadequate Mentoring, and I know how working too much for too little damages our mental health.

In a Finance Broking career while there is **no easy path, LOTS of work to do and much to learn**, there are a lot of unknowns that Brokers are forced to find out by themselves through years of trial and error.

I had worked the massive hours preparing deals and placing scenarios, wasted hard-earned money and valuable time on numerous marketing campaigns, coaches, and courses...until one day, I finally realised that if I wanted to get anywhere, I needed to reach out and learn directly from those who were already where I wanted to be. This, I discovered, was a crucial yet so often overlooked step in building a successful broking career. **I invested in myself.**

So, after over a decade of success, I became a full-time Mentor. Now, it's my passion to back new Brokers entering the industry to build successful careers and avoid burnout from the unique challenges they may not be told about - but can often suffer from - when starting in the industry.

# Supported beyond just words

## Grow your business without worry

- **Sustained growth:** Support in sourcing leads and nurturing clients
- **Repeat business:** Strategies to build a strong loan book of loyal, long-term clients
- **Save time:** Tricky question? Don't dwell, I am here to help
- **Speedy responses:** No waiting days for return calls or email replies
- **Personalised:** One-on-one support, tailored to **your** business
- **Save money:** Flat fee mentoring. No commission sharing here
- **Exposure:** Don't waste time on marketing where you "spend and hope"

Certified Mentor & Full Member Of:



# What current & former Mentees are saying...



**Patrick Gregory**

1 review

★★★★★ a month ago

Pete was my mentor as my finance broking business was being established and his support was absolutely critical to my business successfully establishing itself (now in it's third year). He patiently provided me with the detailed support & in-depth industry knowledge which enabled me to then go out into the market and deal with clients confidently. I would happily recommend any brokers seeking mentoring or support to get in contact with Pete.



**Wayne King**

1 review

★★★★★ a month ago

Whilst I'm new to mortgage broking I've been in business for about 40 years, the last 21 of those running my own Sales & Management Training company. I've met and coached thousands of people but rarely have I met anyone with Peters willingness to completely and utterly commit to me and my success. He's always available to me and goes what I consider to be way beyond what I might reasonably expect him to do to help me. He's an invaluable resource and has a wealth of knowledge. If you're fortunate enough to be able to utilize Peter, I would strongly recommend that you do just that.



**Hugh Dellit**

1 review

★★★★★ 3 months ago

I'm a broker with 4 years experience. Initially, I wondered how much value I'd get from this service given that I only occasionally come up against a scenario I'm unsure about.

I couldn't have been more wrong.

Engaging Peter has been the single best change I've made to my business this year. Having an experienced broker to bounce ideas off, not only about the technical elements of broking, but about your entire loan process is invaluable. My stress levels have dropped significantly since bringing Peter on board because I know that I've got a genuine broking weapon in my corner.

If you're a broker looking to take your business to the next level, just get this bloke on your side.

# What current & former Mentees are saying...



**Justin Forbes**

9 reviews

★★★★★ 5 months ago

If you're a new to industry broker and looking to work with a high quality and experienced mentor for your first two years then Peter Ellis is definitely someone you should speak to. Peter is an experienced finance professional who has more than 12 years working within the finance industry which he uses well to assist new to industry brokers during their first 2 years and beyond. In my dealings with Peter, I have found him to be extremely knowledgeable, quick to respond to queries via phone and emails and he is also willing to source answers through his extensive lender network. Peter has a genuine desire to work closely with new brokers to ensure they meet all their regulatory and compliance obligations as well as supporting brokers to increase their lending knowledge and loan processing efficiency. I highly recommend Peter and the mentoring services he provides.



**Oliver O'Callaghan**

1 review

★★★★★ 5 months ago

I was lucky enough to have Peter Ellis take over from a previous mentor towards the end of my first 2 years. At that stage I'd had 2 other mentors. I found Peter to be perfect for my needs as he cared about me and it wasn't just about increasing his client base for himself. After now having had 3 years broking experience I have met a lot of brokers and the consensus is that it is very difficult to find a good mentor who takes the time to help you 1 on 1 and be there when you need. I found a lot of the time I needed help at strange times of the day and Peter was always only too happy to help. In addition to helping new brokers I found that although I had some experience before working with Peter I wasn't aware that my structures and processes could be worked on. This job is all about structure and process and Peter is an expert at helping to make life a bit easier as a broker by coaching in these areas. I have no hesitation in recommending Peter for mentoring to other brokers both new and experienced and would be happy to take a phone call if anyone wants to discuss.

# What & How?

## What is needed to work with Peter?

- Laptop/Computer with webcam
- Reliable Internet connection
- Zoom Account for fortnightly partnership calls
- Google Drive or other secure folder to store the information that we share
- A keen sense of learning and determination to succeed 😊

## How do I get started?

- Contact Peter via one of the below options to discuss your plans and future needs
  - Contact form on the website [www.financebrokermentor.com](http://www.financebrokermentor.com)
  - 0413 435 763
  - [peter@financebrokermentor.com](mailto:peter@financebrokermentor.com)



**“Success comes when the level of support given  
meets the support needed”**

**Looking forward to helping you start and be part of your journey in  
this fantastic industry.**