

# FINANCIAL PLANNER RECRUITMENT

## RECRUITMENT SERVICES AGREEMENT



### The Service

Acknowledging the traditional on-boarding costs associated with recruiting talented Financial Planner/Financial Adviser professionals, R2A is offering discounted services to the IFA business sector.

This service is extended exclusively to privately held IFA Practices with less than 10 employees. We want to help you grow! Working in partnership with you, the client, our service includes:-

- Market review and resource availability / competitor analysis
- Written Brief prepared for candidates on your Business and Opportunity
- Support with position descriptions and employment contracts
- Support with remuneration models and on-boarding
- Candidate Sourcing undertaken via database, tailored search and advertising
- Market Research Report - Candidate Long List
- Applicant Screening with in-depth assessment to short list stage
- Applicant Briefing on culture, expectations, and contractual terms
- Preparation of Applicant reports detailing suitability
- Applicant reference checking x 2
- Psychometric profiling
- Contract negotiation support
- Adviser On-boarding support
- Follow up support and feedback

### Timeframe - R2A introductions

The timeframe for presentation of suitable applicants and organising meetings will be 2-4 weeks.

### Replacement Guarantee

A three month replacement guarantee will apply if the placed candidate leaves for any reason within that period of time, and payment of invoices has been received within 7 days of the invoice date (unless otherwise agreed or account holder). If a replacement is not required then the original fee remains due and payable.

Recruit 2 Advice does not refund fees and will only replace once under guarantee. This guarantee is not transferable and applies only to replacing the placed candidate. If the original position that was recruited and selected for changes, then this guarantee cannot be transferred to the new position.

### The Fee Structure - Financial Adviser Recruitment

All fees are calculated on the first years guaranteed salary package inclusive of superannuation and other material benefits such as a car allowance. We do not calculate at risk bonuses into the salary.

A flat fee of 15-18% will be payable in two instalments:

- 1/3 on commencement of assignment
- Balance on successful placement

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### About Us

A proud history of Financial Services Recruitment

500 Placements in Financial Planning, Stockbroking, Private Banking

The original business servicing the Financial Services Industry was formed in 1998, and at the time of inception there were approximately 120 CFP designated Advisers in Australia. The R2A brand was launched in 2012 with a continued focus on the wealth management and advice sector.

We have relationships extending across large and small dealer groups, boutique financial advisory firms, industry funds, accountants, investment banks, stockbrokers, fund managers, insurance groups, training providers, IT and online service providers.

- 20 Years' experience
- Financial Services & Wealth sector specialists
- Technical content expertise
- Australia wide coverage
- Research & Key market data

### Client Contact

Dugald Braithwaite  
Client Director, Executive Search & Adviser Recruitment

Dugald has been involved in Executive Recruitment and Board Consulting to the Financial services sector since 1998.

Knowledge, understanding and contacts within the industry extends to banks, investment houses, accounting firms, dealer groups, fund management companies, insurance groups, boutique independent firms, technology companies, industry associations, and training groups.

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