

DKN Financial Group

Platform Service Offer



DKN Financial Group Limited (DKN) is a leading financial services solutions provider to wealth management practices. DKN acts as a buying group, using its scale to negotiate a range of quality products and services that advisers need to run a successful and profitable practice. These include:

- ✦ Platform Solutions - ie; masterfunds and wrap accounts
- ✦ Product Solutions
- ✦ Lonsdale Practice Management Solutions

Each DKN business client has a dedicated Business Development Manager who is the primary contact between DKN and your practice. With a strong understanding of wealth management practices they coordinate all the relationships your practice will have with DKN.

Some of the many ways in which your DKN Business Development Manager can help you grow your practice include:

Wrap Training/ Updates	<ul style="list-style-type: none"> ✦ Training to effectively incorporate Wrap into an adviser's business, increasing business efficiencies ✦ Tailored adviser Wrap training sessions to suit individual business requirements ✦ Wrap desktop hints and tips ✦ Educate and inform advisers of Wrap platform enhancements and explain how they benefit a business
Business Process Enhancements	<ul style="list-style-type: none"> ✦ Assist in creating business efficiencies around the use of Wrap ✦ Integration of additional Lonsdale practice management solutions to increase business efficiencies
Product and Service Innovation and Feedback	<ul style="list-style-type: none"> ✦ Researching the market for innovative and cost effective offerings which help in the running of a business and cater to clients' growing needs ✦ Taking adviser feedback and driving enhancements through the Platforms ✦ Negotiating on pricing with manufacturers to reduce costs increasing revenue and reducing costs to clients ✦ Involving advisers in production of enhancements so the most efficient business practices are incorporated
Issue Escalation	<ul style="list-style-type: none"> ✦ The ability to take issues from the adviser and follow through to a solution, freeing up advisers to focus on revenue generating tasks ✦ Access to key administration touchpoints within the Platform to ensure efficient resolutions ✦ Assisting advisers in ensuring customer satisfaction and in turn maintaining client retention levels
Transitions	<ul style="list-style-type: none"> ✦ High level platform pricing and features comparisons ✦ Analysis of ability to transfer/sell down assets ✦ Assistance with completion of paperwork ✦ Sample of individual client portfolio comparisons ✦ Transitions team to project manage the process and liaise with BT on behalf of advisers, freeing up time from administrative burden

The ongoing and active relationship you have with DKN will become a source of sustainable competitive advantage over other providers.

Please contact your DKN Business Development Manager:

VIC/TAS/SA



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