Why Advisers Join Impact

Opportunities and Professional Development

Impact Financial Services

1 OUR VISION

Impact Financial Services was built with a clear vision — to create a firm where advisers can build long-term careers while delivering responsible financial advice.

We believe that successful advisers need more than access to products. They need:

- professional support
- clear systems and processes
- opportunities to develop their skills

Our goal is to create an environment where advisers can grow both professionally and personally.

2 PROFESSIONAL DEVELOPMENT

One of the core reasons advisers join Impact Financial Services is the focus on continuous development.

Advisers have access to:

- Impact Academy – internal training platform
- Adviser Development Academy (ADA) – regular development sessions
- practical training and case discussions

These resources help advisers build both technical knowledge and practical skills.

3 STRUCTURED ADVISER PATH

At Impact Financial Services advisers follow a structured development pathway.

This includes:

- induction and onboarding
- supervised adviser stage
- competence development
- Competent Adviser Status (CAS)

This structured pathway helps advisers build confidence and professional competence.

4 SYSTEMS AND SUPPORT

We believe that strong systems allow advisers to focus on clients rather than administration.

Advisers work with internal tools such as:

- Pro System CRM for case management
- structured advice frameworks
- internal knowledge resources

These systems help maintain consistent standards across the firm.

5 PROFESSIONAL ENVIRONMENT

Impact Financial Services aims to create a professional environment based on:

- collaboration
- knowledge sharing
- mutual support

Advisers are encouraged to share experiences and learn from each other.

6 LONG-TERM CAREER

Impact Financial Services is designed for advisers who want to build a long-term professional career.

Our focus is not only on business growth, but also on:

- professional reputation
- client trust
- sustainable adviser development

What We Expect From Advisers

Professional Standards and Responsibilities

7 ACTING IN THE CLIENT'S BEST INTEREST

Advisers must always act in the best interests of their clients.

This includes:

- understanding the client's situation
- identifying financial needs
- recommending suitable solutions

Responsible advice helps build long-term client relationships.

8 PROFESSIONAL CONDUCT

Advisers are expected to demonstrate professional behaviour at all times.

This includes:

- respectful communication
- punctuality and reliability
- maintaining high ethical standards

Professional behaviour reflects both the adviser and the firm.

9 FOLLOWING ADVICE PROCESSES

Advisers must follow the firm's advice frameworks and procedures.

This includes:

- completing accurate fact finds
- documenting client discussions
- explaining recommendations clearly

Following structured processes helps ensure that advice is suitable and compliant.

10 ACCURATE DOCUMENTATION

All client cases must be recorded accurately within the firm's systems.

Advisers are expected to use Pro System CRM to maintain clear records of:

- client information
- advice discussions
- recommendations

Proper documentation supports transparency and compliance.

11 CONTINUOUS LEARNING

The financial services industry evolves constantly. Advisers must remain committed to learning and development.

Advisers are expected to engage with:

- Impact Academy learning materials
- Adviser Development Academy sessions
- internal training opportunities

Continuous development helps advisers maintain high advice standards.

12 RESPONSIBILITY FOR ADVICE

Financial advice carries significant responsibility.

Advisers must ensure that:

- recommendations are suitable
- clients understand the advice provided
- risks are clearly explained

Responsible advice protects both the client and the adviser.

13 REPRESENTING IMPACT FINANCIAL SERVICES

When working with clients, advisers represent the firm.

Advisers should aim to build a reputation based on:

- professionalism
- reliability
- trust

Maintaining strong professional standards helps strengthen the firm's reputation.

OUR CORE PILLARS

Client First	Growth	Responsibility	Collaboration
Every decision starts with the client's best interests	Structured development pathway from induction to CAS	Advice that protects clients and builds trust	A team environment built on sharing and support

DOCUMENT CONTROL

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