



Job Request Process ~ Online

We have devised forms and procedures which we believe would make the outsourcing of your paraplanning services a smoother process. Below are the steps to be taken.

A - Please review the Tips Document before sending each Job Request. Complete the Strategy Guidelines and scan the documents listed in the Document Checklist and save in one folder ready to be lodged electronically.

B – Log on Paraplanning Direct website using your username and password. Fill the job request online and submit electronically, making sure you have filled in all the compulsory fields.

C - Xplan Users – you add the client to the relevant “Paraplanning” group so that we can access the client’s data or provide us with your Xplan login.

D – You will receive an automatic acknowledgement on the same day, confirming the job request and you will be issued with the job request number. All jobs received after 3.30 pm (WST) will be counted in the next day’s workflow.

E - Within 48 hours we will review the Job Request. We will confirm via email the costs of the assignment, expected date of completion and any other information that we may require.

F - We will send you a draft for approval within the time-frame stipulated in our email.

G - Within two days of your approval, we will complete the document for you to send to your compliance department for vetting, if required.

H - We will invoice you for the job.

I - We will make any changes required by vetting within 24 hours, unless substantial.