



ABN: 31 632 508 671
Borg Financial
4/80 Market Street South Melbourne
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Dear Future Broker;

Please see outlined summary of my mentor program:

- Minimum 2 meetings per month per fortnight on a Thursday between 1 – 2 hours per session. Via Zoom or in person at my office. More at mentees request.
- Minimum 20 deals to be completed. The first lot of 10 deals mistakes will be made. Should the second lot of 10 deals show the same errors as the first lot they do not count to the minimum 20 deals successfully settled.
- As an SFG broker they must sit in a minimum number of my own appointments to learn the proper interview process. I also must sit in on their own interview as a shadow guide.
- Must come to PD days. Nonnegotiable.
- Full SFGconnect system training.

More specific coaching and training regimes:

- Complex residential lending scenario overview. Each Thursday session a complex scenario from myself or one of the mentees is broken down to understand its fundamentals of successful conversion.
- Commercial lending overview.
- Asset lending overview.
- Niche finance lending overview.
- Business coaching, budgeting, and business scalability learning.
- Personality training, body language training and professional etiquette training within interviews.
- Referral connections, how to connect with referrals.

Compliance training:

- How to maintain strong compliance.
- How to spot fraudulent customer activity.
- Learning how to say NO and its implications.
- Updating on changes to finance landscape, bank and broker sectors.
- Upcoming reform updates.



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Mentee requirements:

- Should the mentee request or need specific areas of focus or want to work on areas of low confidence this will be prioritized. Example speaking, product knowledge, system setups.
- Adapting to Change of environment..
- R U OK. Helping mentees overcome out of career impacts that directly effect their own ability to operate.
- Community engagement.

The mentoring style I provide is modern, robust and utilizes the wisdom of old school techniques with the modern technology of new school to bring a hybrid style of learning and coaching which will stimulate younger brokers to be more successful on their own.

Should you have any questions please do not hesitate to contact me.

Pricing is subject to meeting the mentee and we offer an array of options to join, including fee per month, commission split model or operating under your own banner as part of our aggregation.

Kind Regards,

Christopher Borg

Director of Borg Financial