



## Media Release

# Libertas FP Announces Accounting Firm Joins Dealer Group & Strategic Alliance with Mentor Education

**Tuesday August 12, 2014.** Libertas Financial Planning Pty Ltd (Libertas) Director, Mark Euvrard, has announced that Eagle Financial Pty Ltd is the first accounting firm to join the dealer group. Currently, Libertas has around 30 advisers operating as authorised representatives under its AFSL and the dealer group recently expanded its offer to include accountants that require an AFSL from July 2016.

Libertas offers accountants three basic solutions –

1. They can obtain their own AFSL through partner company [My Dealer Services](#)
2. They can join Libertas as a [full financial planner](#)
3. They can join Libertas as a provider of [SMSF advice only](#)

Commenting on the Libertas offer for accountants Mark Euvrard said “We have been preparing for this for some time to provide a facility for those accountants seeking an independent / non institutionally aligned or owned dealer group that can provide them all the tools and services required to fulfil their financial planning needs compliantly, as well the latest calculator tools to assist them address the SMSF needs of their clients”.

“History tells us there will be a rush at the eleventh hour as July 1, 2016 approaches, so we have positioned Libertas now and are promoting a special offer for those accounting practices that wish to provide SMSF advice and position their businesses well in advance of the forthcoming deadline”.

Located on Sydney’s northern beaches, Eagle Financial prides itself on being a young, dynamic and innovative chartered accounting practice committed to adding value to their clients with proactive tax and business solutions. Headed by David Olofinsky and fellow director Adam Johns the firm is growing rapidly to meet the demands of business owners and clients in the area.

“For us, the Libertas offer ticked all the boxes”, said David Olofinsky. “Furthermore, the software provided for TTR, adequacy and super modelling being automatically downloaded into a compliant SOA allows Eagle Financial to seamlessly deliver SMSF services to our clients compliantly and most importantly, we have the infrastructure to further expand our marketplace offering in this area”.

“The special offer to join Libertas at this time was a ‘no brainer’ as we can now go forward knowing Eagle Financial is trained and compliant – avoiding the last minute panic to fulfil ASIC requirements and as a result, it will be business as usual for our clients in July 2016”.

Mark Euvrard has observed that it is now becoming clear that the path to getting either one’s own AFSL through a consulting firm such as My Dealer Services, or joining another AFSL is actually quite time consuming and far from being a straight forward process.

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“Despite the generous concessions provided by ASIC, it is obvious that most accountants are not aware of their obligations – especially with respect to the training required prior to receiving their Authorised Representative certificate”.

“The alliance with Mentor Education, one of Australia’s leading specialist providers of quality training in financial services, fulfilled all our requirements and Libertas can provide accountants joining the dealer group with all their appropriate transitional training”.

Mentor Education was established in 2002 by founder and Managing Director Dr Mark Sinclair. With over a decade of marketing, sales, course delivery and assessment experience within the financial services industry, Mentor has built strong links with industry associations, universities, licensees, practice owners and financial planners / advisers.

“One of our greatest strengths as a quality educator in the financial services industry is that we recognise that most practitioners deal with immense demands on their time. To assist industry professionals maintain a work / life / study balance and achieve their ASIC accreditation requirements, we have developed a number of flexible study options”, said Mark Sinclair.

“Mentor’s Accountant’s Bridging Course will be particularly attractive to accountants seeking ASIC accredited RG146 qualification as it provides recognition of prior learning and the study can be undertaken on online or in a classroom over eight (8) days”.

Whichever mode of study accountants choose, they will have access to Mentor’s full phone and email support to help them become qualified as quickly as possible.

The classroom option offered by Mentor includes three workshops:

1. 3 days – covering financial advice, life insurance and superannuation;
2. 3.5 days – SMSF, Investments and the first half of the SOA assignment
3. 1.5 days – second half of the SOA assignment

“The licensing regime for the accounting profession is fast approaching and it is of particular concern that many accountants have yet to prepare their practices for the new framework required to provide SMSF advice. The Libertas solution and alliance with Mentor Education provides a compelling marketplace offer for accountants to act now and position their practices well before the July 2016 deadline”, concluded Mark Euvrard.

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**Notes to the Editor:** Pictured below are Mark Euvrard of Libertas, David Olofinsky of Eagle Financial and Dr Mark Sinclair of Mentor Education

