

Worksorted

Contact: Simon Betchley (CEO)

Phone: 0411 771 250

BFP Member Benefit & Special Pricing Arrangement

Business Name

Worksorted Pty Ltd

Website: www.worksorted.com

Synopsis of Business

An Australian-based Fintech company founded in 2009, Worksorted now supports over 250 advice practices and licensees throughout Australia and New Zealand. Finding faster and easier ways for advice professionals to manage their business is at the core of everything we do and can be experienced through the vast range of functionality our system has to offer including, CRM, workflow, revenue management and compliance tools - all offered through a single license with unlimited users.

We have grown our business not just through great functionality but through exceptional service and support to our clients. We've remained close to our users to ensure they get the value they seek but also to take their feedback and ensure we continue to build relevant and functional software.

Our latest NPS results are a testament to our commitment, achieving an **NPS of +32** where our closest competitors struggle to achieve positive outcomes at all.

Product/Service Description

Worksorted is a simple and intuitive **business management solution** built specifically for the financial advice industry.

Amongst many other features our software incorporates an easy-to-use CRM and workflow solution with revenue and compliance management capabilities to provide advice firms with complete **visibility, control and peace of mind** when it comes to their business and client data.

BFP Pricing Arrangement

Rather than charging per user, per module, Worksorted is offered as a single license fee for a business, which includes an **unlimited number of users and all functionality** the system has to offer.

	<i>Pricing Incl GST</i>
Ongoing License Fee	\$693 per month, or \$6,930 per annum
Once-Off Implementation Fee <i>Setup, client details import & initial training</i>	\$1,650

Please Note: The license fee includes an unlimited number of users and all functionality the system has to offer.

Special Offer Inclusions for Boutique Financial Planners Association Members:

- **24 hour priority onboarding** (Standard onboarding commitment is 7 days)
- **Complimentary FDS & Opt-in template design & coding** (Representing a \$300 saving)
- **\$500 complimentary SMS credits** (Representing over 3,300 complimentary SMS)

Process to Access Offer:

1. **Book a webinar or chat** - Should you require a demonstration for you or your staff, you can [click here](#) and book in at a time that suits best.
2. **Sign-up** - If you'd like to proceed with our software, you can [sign up here](#)

Business Representative Details

Name: Simon Betchley

Email: sbetchley@worksorted.com

Phone: 0411 771 250

Date: July 10, 2020