

Yodal

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BFP Member Benefit & Special Pricing Arrangement

Business Name

YODAL PTY LTD

Website www.yodal.com.au

Synopsis of Business

Yodal is an Australian software provider that works closely with our partners to ensure they can deliver a dedicated estate planning service / product that ensures their clients are not exposed to the risk of intestacy. The user experience to access the required services and advice to mitigate such an outcome is accessible, simple, scalable, cost competitive, and most importantly, able to be personalised for your clients.

The landscape within and surrounding the financial services industry is constantly changing, client choice is increasingly determined by the availability and accessibility of services and advice which are progressively becoming the primary determining factors in a current or potential client purchasing decision.

With 53% of Australian adults in need of estate planning services, the Yodal solution ensures that BFP members can deliver these valuable and value-added client services in a high quality, consistent, risk free, scalable, cost-effective, and fully compliant manner. Additionally, BFP members can achieve more robust client engagement and realise a significant new revenue stream to help grow your business.

Product/Service Description

Class U – \$200 pcm. Ideal for sole operators looking for a simple solution.

Class P – \$300 pcm. For organisations that have multiple users operating under a single account.

Class R – \$500 pcm. Set-up \$1500. A rebranded solution that integrates with your website and enables direct consumer engagement with your current and potential clients. This is the most popular subscription level adopted by Yodal clients.

Class M – For enterprise accounts.

NOTE:

- a. Monthly access fees are discounted from the standard Yodal pricing for BFP members
- b. Access fees are offset by your Advisor fees on each estate planning matter
- c. The once-off Class R setup cost has been discounted by 25% for BFP members
- d. Additional user changes have been REMOVED for BFP members

BFP Pricing Arrangement

As above

Process to Access Offer

Email support@yodal.com.au mentioning BFP and a support team member will contact you to arrange a demonstration and setup.

Alternatively, contact Brandon Thompson on 0438 376 745

Visit Yodal at www.yodal.com.au

Business Representative Details

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