

Research assistant, industry expert, strategy adviser

Desk Caddie is here!

A message from the team

Keeping up with industry news, legislative changes and strategies affecting your clients, is a time-heavy task. That's why Strategy Steps is really excited about Desk Caddie.

When you become a Desk Caddie subscriber you become better equipped to help your clients. Desk Caddie's value lies in its potential to help you explore strategy opportunities for clients and learn about new areas and strategies that may provide wider opportunities for clients and your business.

It's also a handy reference library housing regularly updated technical information, industry news, facts and figures, legislative updates, links and a glossary - all in one place.

It's fast, efficient, practical and provided by a team of experts. Desk Caddie provides the practical support to help you create innovative solutions in this new financial planning landscape.

Read on to hear about the Desk Caddie advantage from some of our clients and learn how Desk Caddie can improve your business.

Email us at info@strategysteps.com.au or call Assyat David at Strategy Steps on 0419 469 076 to find out how to subscribe.

Desk Caddie in action

4 scenarios



How does Desk Caddie help me keep on top of changes driving the industry and my business?

Desk Caddie consolidates financial news in one place. Our **Latest News** section provides quick updates on changes while the technical library provides the details. The information also highlights the implications of changes for clients and your business. You can also keep abreast of how legislation is progressing through parliament in the **Quick Reference** section.



How can Desk Caddie support me in preparing a financial plan for my client?

In our **Technical Library** and **Strategies** sections you'll find the framework for constructing your plan and explaining the strategies recommended to your client. Use the **Facts and Figures** section to check any relevant conditions, restrictions, rates, thresholds or figures vital to your plan. And the **Client Education** section can help you explain key financial planning issues to your client.



What strategies and information can Desk Caddie offer about the transition to retirement strategy and how it works for my client?

Simply run a search with the terms **transition to retirement**. Results come up in: the **Technical Library** which explains the rules around this strategy; the **Strategy Section** which provides a step-by-step paper explaining how the strategy works; and the **Client Education** section with ready-to-use materials to help educate your client.



Clients are increasingly asking for advice on aged care and often need to act quickly. It's a new area for me and I need the latest figures and information at my fingertips.

Desk Caddie does the research for you and provides core information on aged care. Our **Q & A** section includes questions on specific issues affecting clients moving into aged care that may be similar to your client's situation.

5 Reasons

to subscribe to Desk Caddie

UP-TO-DATE

An online source of regularly updated technical information and industry updates.

PRACTICAL

Helps advisers understand and apply the practical steps to implement strategies.

DEPENDABLE

Expert advice from highly regarded specialists.

INDEPENDENT

Provides detailed strategy solutions that focus on client needs not supporting product sales.

COMPREHENSIVE

Covers an extensive range of financial planning areas.



What our clients say about

Desk Caddie



“Desk Caddie is a core resource used by our advisers. It helps them keep up-to-date and increase their knowledge of financial planning strategies and changes, including legislative changes. Feedback about the service is very positive. Our advisers say it allows them to be more productive by accessing one source of comprehensive information. Desk Caddie is also an important part of the support services that Lifespan relies on to attract and keep good quality advisers.”

Pierre Pineault, Technical Manager, Lifespan Financial Planning



“As the Head of Technical Services at a large dealer group, being able to quickly source technical information on a wide range of topics is important. More important however, is understanding the legislative and regulatory base behind the sourced information. Desk Caddie not only provides information on a wide range of topics relevant to financial planning, but also details the relevant legislative and regulatory detail, which is generally lacking from alternate providers. Having such information readily at hand is invaluable when responding to queries, which on face value, can be interpreted differently.”

Frank Camilleri, National Technical Manager, Shadforth Financial Group Limited



“Desk Caddie is a vital part of our business. It keeps us up-to-date with financial planning strategies that can really add value to our clients. It's also a fantastic technical resource providing huge time and cost efficiencies for a company our size. We would highly recommend Desk Caddie to other financial planners operating under their own license.”

Matthew Farrell, Managing Director, Five Pillars Financial Planning

Desk Caddie Video

your guided tour

In this short **video**, we take you inside Desk Caddie to discover key features and functionality.

To view it please go to www.strategysteps.com.au and click on our **Services** section.



Contact us at info@strategysteps.com.au or call **0419 469 076** to speak to us about the Desk Caddie advantage.