



The Adviser Platform

0800 827 699

info@tapnz.co.nz

We know what it takes to be an adviser.

We also know you didn't get into the industry to spend your days stuck behind a computer.

TAP gives you the opportunity to focus on providing a proactive value-adding service for better business outcomes.



After joining TAP we have been surprised and thrilled with the efficiency we have gained and the level of commitment TAP have shown to our Business.

We're close to doubling our throughput for the same period last year and more than doubling for the previous 2 years. I feel very supported by Ryan and the team, I feel extremely comfortable and in control of my business now and couldn't be happier with my choice to go with TAP

Matt Thomson, Simple Insurance.



My systems, processes, client management and outbound email communications are pretty much on auto-pilot, which means I have more time for client meetings, preparing and giving advice - the stuff I should be focussing on.

It's not an understatement to say joining was one of the best business decisions I've ever made. Now I have the time the capacity, and the confidence for growth and/or an acquisition.

Regan Thomas, Money Tree.

Join The Adviser Platform

TAP PARTNER

Benefits

Purpose-built CRM

Customisable to your brand and your needs, our CRM was designed by advisers for advisers.

- **Seamless transition**

Switching is easy - our experienced team will migrate your existing client data.

- **Everything in one place**

No more spreadsheets or dusty files clogging up your workspace.

- **Squeaky-clean data**

Target potential clients with sharper marketing strategies and increase the value of your business.

- **Be audit ready**

Get all of your ducks in a row with a home for all client notes, files and service overviews.

- **Get in the game**

Turn leads into clients with our sales pipeline tools.

- **Your data is protected**

We use the latest technology platforms to ensure total confidentiality.

All partnerships include

No locked-in contracts

No commission splits

Regulatory guidance and support

Marketing and accounting services

No cost to TAP Partners

TAP PARTNER + ADMIN SUPPORT

Includes all TAP Partner benefits, plus:

Grow your client base, not your admin team

A comprehensive admin support service from trained professionals that allows you to focus your time on growing your business.

- **The perfect match**

Our support service matches your business requirements. You only pay for what you use.

- **Avoid admin headaches**

All data entry is handled by our specialist team to ensure accuracy and clarity.

- **Handling and processing**

We provide support across insurance, mortgage and KiwiSaver services.

- **Sweep out your inbox**

We'll manage your business emails, making sure the right emails get to the right person.

- **Turbo-charge your existing staff**

Free up you and your team to focus on the clients, not the day to day admin.

- **Preparation for licensing**

We'll help get your house in order and ensure you're ready to transition.

- **Welcome an audit**

Our comprehensive support and data management ensures your processes are clearly documented.

Admin from \$150/week

