

A Business Opportunity

in Business Advisory Services



BACKGROUND

There are approximately 2.4 million businesses in New Zealand and Australia combined, with 80% of them falling under the SME category of 30 or less employees. Typically they get annual advice from their Accountant and only write a business plan if their bank requires one in the process of applying for funds. While there's specialist help from project based consultants to help with HR or marketing etc, there's practically no professional ongoing support on the fundamentals of how to operate, manage and grow a business. Professionalising this level of support needs high calibre advisors using world-class tools and content. This prospectus outlines the commercial opportunity to assist business owners using your skillset and experience...

01

The Business Opportunity

TAN offers a structured professional advisory services opportunity specifically tailored for the SME community.

By joining our team of professional Business Advisors in NZ/AU, you can tap into servicing this significant market.

Through our 12-24+ months programs, you have the potential to earn between \$180,000 and \$300,000+ working with as little as 6 to 10 clients.

Client delivery is organized into fortnightly sessions, allowing for 90 minutes of focused engagement. As part of our offering, you will have the opportunity to deliver our signature business success program, a comprehensive framework for achieving client results for any type, or size, of business.

You can choose to work face-to-face or online, and your clients can be local or located anywhere.

With an internet connection, you can enjoy the freedom to work from anywhere, providing you with the flexibility and convenience to manage your advisory services effectively.

TAN offers a membership style commercial model with an initial 90 day launch period to establish training and client on-boarding tasks. Full training and tools are provided including a 'Tech Package'. Branding is usually under the TAN brand, however this is not mandatory and may be optioned in or out depending on the advisors circumstances. Often advisors will start with TAN branding and once established they can rebrand as required. Upon successful completion of the Launch period, they are invited to join TAN as a full-time member.

02

The Employment Market

Many companies impose long working hours on their senior staff creating a demanding work culture.

Politics and policies within these organisations can often lead to a frustrating and challenging environment. The constant pressure to achieve targets can be stressful, especially when the primary goal is simply to maintain one's current role.

Furthermore, once senior status is achieved, income levels can tend to plateau limiting the potential for financial growth.

This can sometimes feel like entrapment where senior staff don't particularly like their current employment situation, but can't afford to leave given the lifestyle they have built around their current income.

Ultimately the security of a fixed salary can come at the expense of a fulfilling home-life and quality time with family.

There are now numerous alternative options available to generate income outside of a traditional job or career path for those with business experience.

Exploring these alternatives can ignite a sense of entrepreneurship with greater flexibility, freedom, and potentially higher earning potential, especially with the opportunity of maintaining a healthier work-life balance.

Often this is just what is required for those who are feeling stuck in a career that is only half way through.



03

The Advisory Space

In the past, local bank managers would require business plans and financial forecasts from business owners seeking financial support (in the form of loans or overdraft facilities).

However banks shifted their business model from local banking to centralised credit committees which created a void in personalised guidance and support for small businesses.

Apart from banking, accountants have traditionally been the other professional body responsible for business advice. However, accountants are often preoccupied with tasks such as handling compliance, keeping up to date with regulatory changes and advisory projects for their larger clients. This leaves limited availability to assist small businesses especially with the advent of accounting packages such as Xero.

Cloud-based accounting has simplified the servicing time that accountants need to spend with smaller clients who often can't afford advisory fees anyway.

Unfortunately, accountants may not be equipped to provide the necessary expertise in areas such as marketing, sales, and staff engagement. As a result, small businesses are often perceived as a difficult market to service due to their constant cashflow issues and the wide range of advice needed to assist them.



As the SME business environment has become more challenging (e.g. online marketing requirements, staff availability, supply chain issues to name a few), owners need more help than simply financial analysis.



MEET THE NETWORK

Chris Beard

With a background in consulting and experience in business turn-around, Chris has excelled as an Advisor.

Prior to becoming an Advisor with Trusted Advisor Network, Chris had held several senior leadership roles where he specialised in the transformation of mid-sized manufacturing businesses as well as owning a FMCG manufacturing business.

His strong background in business & people management allowed him to easily transition into the role of a Business Advisor with TAN.

6+ years in, Chris now has a strong base of 1:1 clients as well as a high performance group program.

Outside of work, Chris is a talented brass musician and a super-keen sports fisherman.

The flexibility of being a Business Advisor has allowed Chris to operate on a week-on/week-off basis with a lifestyle that gives him time with his family, as well as taking clients out on his boat to reel in catches like this one!

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The Market Competition

For the past 20 years, franchises have catered to the market, but their high purchase costs can be prohibitive for many looking for help to enter the space

Independent consultants, on the other hand, have tended to focus primarily on larger clients who can afford their substantial fees. This still leaves smaller businesses without access to their expertise.

Independent coaches often lack the professional standards, ongoing training, and program resources that limits their ability to provide comprehensive support.

Furthermore, the low barriers to entry in the coaching industry mean anyone can call themselves a coach which leads to a lack of consistency in servicing standard and extremely variable client experiences.

While most governmental agencies provide free mentoring services, clients often lack a personal investment or "skin" in the game, which can impact the level of commitment and subsequent results achieved. It's a reality of the advisory space that clients don't value what they get for free.

Many coaches attempt to create their own content or rely solely on offering 'conversation-based' advice, potentially diluting the effectiveness of their services without the tools to assist their clients to implement.

05

The Revenue Model

To invest in our services, clients pay a monthly retainer, the amount of which is determined by their level of service.

Our programs are designed to retain clients for a period of 12 to 24 months or even longer, depending on the results achieved.

In fact, many of our clients have established long-term relationships with their clients lasting 4 to 6 years. By offering additional team presentations, it becomes possible to achieve higher fees.

In addition to our core offerings, we also provide group coaching program delivery as an additional revenue model. Moreover, we have exciting opportunities available for specific target groups, such as tradespeople, who can benefit from tailored services.

We offer additional services that encompass various projects, including business sales, allowing us to cater to a wider range of client needs.

*These fees may sound high and unaffordable for many SME businesses. However all our programs establish a business case "return on investment (ROI)" during the engagement process prior to commencement meaning we calculate the upside business opportunity relative to the program investment. More details in The Value Proposition.



On average, fees range from \$1500 to \$3500 per month for ongoing programs. This means that each client contributes approximately \$25,000 to \$30,000 annually*.

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The Income Expectations

Initial 12 months from launch are for an on-target earnings forecast of \$125,000 taking into account a portfolio of 5 clients.

Typical acquisition rates are a minimum of 1 client per month as a benchmark. This is conservative given each client represents 3 hours a month in session-time. The above forecast allows for client attrition due to lack of experience and a high percentage of time being committed to sales and marketing activities in order to establish income. That said, many advisors with strong aptitude and work ethic are able to generate income for the first year at twice the above amount.

As discussed, the income in the first year is heavily influenced by the process of learning client acquisition and retention skills. However, the second year is considerably easier due to the establishment of a client base of 5-8. Once this base has been established, the focus shifts towards honing skills in group presentations and niche marketing.

The income expectations for the second year are based on 10 clients, with billings ranging from \$250,000 to \$300,000.

Beyond the second year, the emphasis shifts towards developing a scale model of delivering your program to groups of business owners. The income levels achieved vary considerably based on the motivation and ambition of each advisor. Successful advisors in TAN are typically able to generate monthly earnings exceeding \$35,000 or an annual income of \$400,000 to \$600,000. These top performers often have a niche and/or offer a group program as part of their service suite.

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15 Sheena Trumble enjoying her rural lifestyle in South Australia

MEET THE NETWORK

Sheena Trumble

Sheena's decision to become a Business Advisor was driven by her desire to build a lifestyle focussed around family & her rural lifestyle.

Sheena has used her extensive commercial experience as a senior executive in the Energy Sector as a strong foundation for her transition into the Business Advisory space.

After making the lifestyle decision to become an advisor, Sheena was quickly able to build a strong client base while developing her coaching skills as she progressed.

She has particularly enjoyed seeing first hand the difference her coaching skills have made.

This has been evident not only with her client results, but also in the way her clients have taken ownership for implementation of her advice, rather than her being responsible for task completion.

A devoted grandmother, the work-life balance available with TAN membership has allowed Sheena to spend more time than ever enjoying her grandchildren, family, pets & farm animals.

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The Regulatory Environment

The advisory industry operates without specific regulations governing its practices.

While not mandatory, some advisors opt to obtain public liability or professional indemnity insurance.

TAN offers a customisable Client Agreement template that advisors can edit as needed to suit their specific circumstances.

This agreement establishes the terms and conditions between advisors and their clients, including a non-liability clause.

Additionally, the agreement includes provisions such as confidentiality and a clear description of the services to be provided.

It is important to note that these agreements function more as supply agreements rather than traditional contracts. Advisors handle invoicing directly, sending invoices to their clients from their own company.

In the 20 years of experience in the field of business advisory, TAN has never heard of a client taking legal action against their advisor. All TAN documentation and presentations for use during client on-boarding clearly outlines the onus of responsibility being on the client rather than the advisor. That said, there is a distinction over the legal term “business advice” rather than “business coaching”. The latter carries no statutory obligations hence the use of coaching terminology in the wording of TAN agreements.

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The Risks Involved

Engaging in any business opportunity inherently involves risks that need to be acknowledged.

Disregarding the risk/reward dynamic associated with being in business overlooks this essential aspect.

One risk to consider is underestimating the realities of self-employment, requiring confidence, self-reliance, and a proactive attitude. It is also important to recognise the risk of assuming that the business should be high income for low effort right from the outset. Another risk lies in the misconception that business acumen alone can replace the importance of following an established system. Embarking on this new career requires adherence to specific rules and a commitment to continuous learning.

The most significant risk factor for new advisors entering this industry is a lack of focus and the temptation to pursue (ultimately ineffective) marketing ideas. It is crucial to acknowledge that all new ventures require training, and progress may not always follow a linear path.

Failure to adhere to the system can result in the loss of the upfront investment as

well as the stress involved with attempting to find who is at fault.

This risk is mitigated through the discovery process that takes place between candidates and TAN, ensuring alignment and understanding. Ultimately, success stems from placing trust in the system and putting in consistent fieldwork.

As with all new ventures, the timing of cash flow is vital. It is advisable for all candidates to consider having adequate funding to sustain themselves during the initial three months of establishment and to view this funding as part of the capital requirements to generate an ongoing business income.

In reality, a single client with 3 months of client fees funds 100% of the upfront investment making any risk of investment loss extremely low. However, some candidates are more sensitive to risk than others, possibly making them less suitable for advising clients who have already accepted the risks of self-employment.

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The DIY Option

An alternative to partnering with a structured network like TAN is the option of pursuing a DIY approach.

In this case, an advisor would utilise various services to assemble their offering, including the development of an online presence including a website, branding, social media strategy, task management software, financial software, and more.

Program material can be created using your own background with any knowledge gaps filled by using tools such as ChatGPT etc. In this way prospective advisors can tailor content for their clients. The only obvious downside is the time involved to prepare all this as well as making your content into activities, exercises and specific tasks for your client to follow. Without this, clients will rely too heavily on advisors to help, or have them implement their program leading to over-servicing issues.

A less obvious challenge for the DIY advisor to solve is developing a clear and structured program so prospects can see why a long term program is necessary rather than merely a quick fix.

The DIY advisor may find themselves describing how they'd solve a business challenge, or improvising the type of program material they'd use to help a prospect. Both of these options result in lower conversion rates and an inclination towards short-term hourly rate project work instead of long-term retainers.

DIY advisors tend to dedicate less effort to marketing and rely heavily on referrals from their current projects for business growth.

While this method can certainly be effective, it often results in either an overwhelming workload or insufficient business. The frequent occurrence of appointments that don't convert into paying clients highlights the challenges faced by DIY advisors. Additionally, the significant time spent on researching and experimenting with new approaches represents an opportunity cost that often hinders their ability to grow.



MEET THE NETWORK

Geoff Young

Before joining TAN, Geoff was Director of a large logistics company...

Geoff's background in ownership and directing a large company, coupled with his specialised skills in mergers & acquisitions in the logistics space, have allowed him to excel as a Business Advisor.

He has brought this experience into his client-base, working with other owners to develop their businesses at scale, as well as assisting them with exit planning depending on the objectives of the client.

This work has led to specialised consulting opportunities that have been developed in conjunction with TAN to give a unique service offering to his clients.

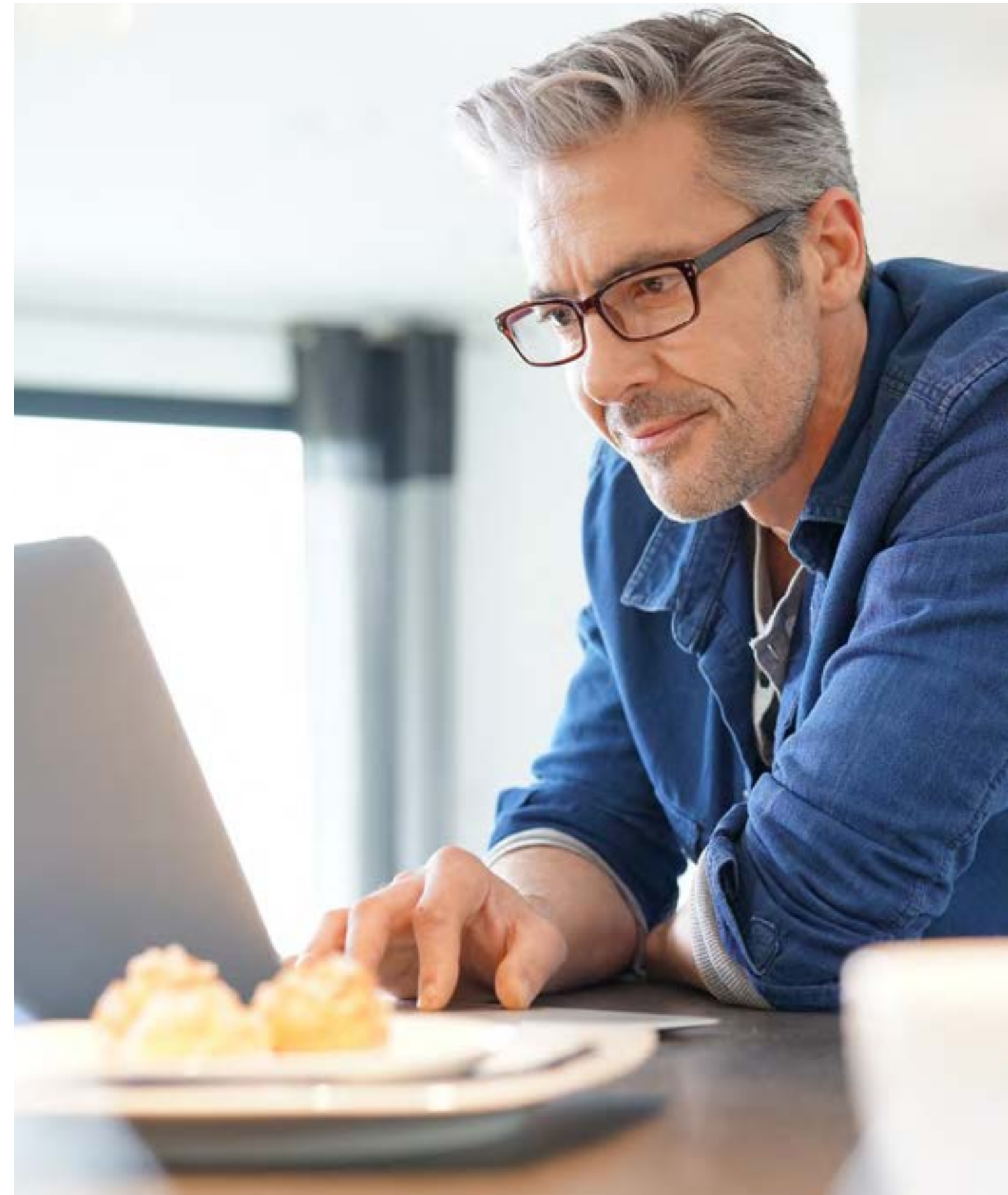
He works with his wife Cathy in the business as they both provide group and individual programs to local businesses from their offices. Cathy has an extensive knowledge of behavioural profiling and coaching skills that she brings to leadership and recruitment situations which enables their clients to motivate and grow their teams.

A talented guitarist, Geoff is also co-captain of the only known TAN floating boardroom.



OPERATIONS

All advisors receive comprehensive training over a period of 90 days, covering all aspects covered in the Operations Section of the Prospectus.



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The Client Timeline

New clients are expected to be acquired at a typical rate of one client per month (assuming an advisor is starting from a zero client base).

This projection assumes a full-time commitment, adherence to the system, and a willingness to be coached.

However, the rate of client accumulation can increase significantly when candidates demonstrate discipline in their fieldwork. Depending on aptitude and dedication, candidates have the potential to acquire clients at a rate that is 2 to 3 times higher than the baseline.

Once initial clients have been gained by following the TAN system, it's vital that advisors maintain their marketing momentum.

Acquisition of new clients may slow down if new advisors choose to prioritise the "consolidation" of their existing clients rather than growth. Consolidation refers to a focus on client retention, delivering program material, learning how to coach, seeing evidence of client results etc, rather than actively pursuing new client acquisition.

All advisors get clients using the TAN system, the only variation is the timing of how many they accumulate over the initial launch phase.



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The Sales Pipeline

At the heart of the TAN client onboarding process is the launch system known as 'The Red Carpet Pipeline' (so named for its ability to minimise client resistance).

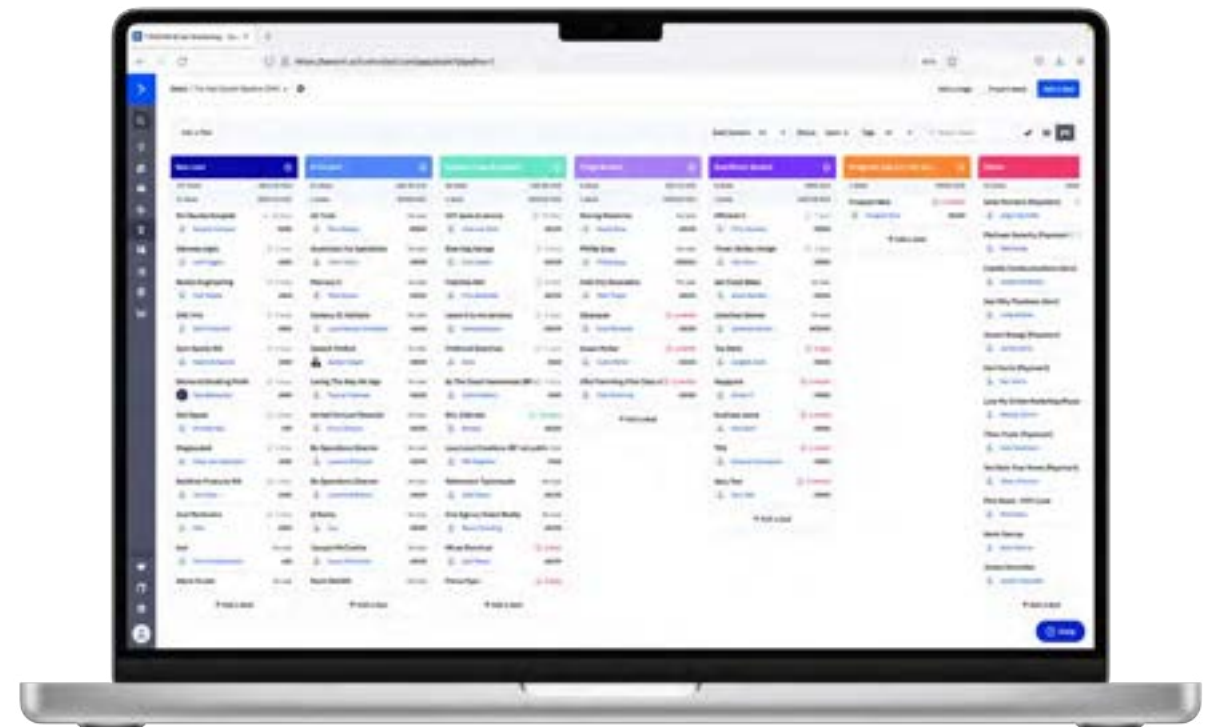
The advisor is responsible for gathering contacts using the training and tools provided, which are then uploaded into the TAN CRM system. The contacts are sourced through a combination of online and offline tactics. Videos, workbook exercises together with training from TAN experts clearly explain the step-by-step process to follow resulting in selection of target contacts. TAN also provides the best types of businesses to target with the highest response rates to the marketing campaigns being deployed.

To ensure comprehensive information, online tools are utilised to research and populate all relevant fields for each contact. Following the research phase, the contacts are initially approached through social media channels. Subsequently, they are entered into an email automation sequence within the CRM system.

This sequence comprises a series of seven emails that offer the TAN lead magnets to the contacts. As responses are received, the respective contacts are removed from the automation.

Once a contact responds, they progress from the marketing stage to the sales stage within the Red Carpet Pipeline. This transition signifies a shift in focus from marketing efforts to appointment setting where you'll actively engage with the contact in a sales capacity.

By following the tasks involved with each stage of the sales pipeline, advisors will quickly fill their diary with prospective clients.



Following the system over the first 4 weeks from a standing start results in an average of 5 face-to-face, one-on-one appointments being generated per week.



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The Lead Magnets

Lead magnets are what we offer business owners (prospective clients) when we make first contact with them.

Examples of common lead magnets offered by online marketers are “free sessions” or a “free white paper” or a “free report”. Their job is provide something of value to the prospect that helps or engages them and thereby introduces us to them.

The challenge when developing successful lead magnets is find something that is relevant when a typical business owner is perpetually busy running their business. Therefore, any lead magnet must provide a very compelling reason for engaging in a face-to-face discussion, let alone merely getting a response. Over the years, TAN marketing has extensively tested and measured numerous lead magnets, learning from many failures along the way. As a result, TAN has identified three lead magnets that consistently perform well.

The most successful lead magnet that TAN has developed for local SME business owners is the offer of a 'business feature.' This entails creating a 'PR piece' that advisors share through TAN social channels. This approach has resonated

with both TAN advisors and business owners alike, as it comes across as friendly and doesn't carry the usual “sales vibes”.

Business owners view the offer as an opportunity to showcase their businesses rather than being pitched at. It is only after engaging in an initial interview for the business feature do prospective clients agree to further contact with our advisors. In this way both parties are able to have an exchange to see if further opportunities are worthwhile or appropriate.

Business features generate exceptional response rates of up to 50%, far surpassing the performance of any other offers. Additionally, TAN provides additional lead magnets, such as 'free stuff' available on websites that include various offers such as 'Cheat Sheets' by industry and worksheets offering exercises that produce valuable insights.

To effectively deliver these lead magnets to our target audience, we employ five marketing campaigns to reach our desired demographic.



MEET THE NETWORK

Tony Kingston

Tony has owned and operated multiple hospitality companies at both the retail & wholesale levels prior to joining TAN

Since transitioning into the Business Advisory space, he has quickly established a loyal client base sharing his extensive knowledge of growing businesses and teams.

Having maxed out his premium client roster, Tony is expanding his business beyond his current clients to establish a group program specialising in Trade Services.

This is allowing him to scale his business and assist more clients with his skills and experience.

Tony speaks French, Japanese & Italian but consults to his clients in Australian.

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The Marketing Campaigns

There are five distinct marketing campaigns that provide opportunity to acquire clients within the TAN framework.

As part of the training, TAN provides a comprehensive list of ideal business types to target for client acquisition. Each campaign is covered in detail during your launch training where a TAN expert is on-hand to assist and guide you specifically for the purpose of securing appointments.



The first campaign, known as the **Direct Targeting Campaign**, involves a field trip into your local community. The focus is on locally operated, privately owned businesses, which will provide your initial client base. These businesses are easily located and serviced, and they all stand to benefit from your business optimisation services.



The Networking Campaign centres around active participation in local networking groups, sometimes referred to as "leads clubs". These groups consist of small business-to-business operators who exchange leads with each other. Typically held on a weekly or fortnightly basis, these networking events provide a valuable source of leads. Through thorough training in the TAN networking approach, this campaign yields some of the fastest results for new client acquisition.



The Social Media Campaign leverages two key platforms of Facebook and LinkedIn, along with Google. Google Maps is utilised to identify potential leads and for harvesting contact details. Facebook, on the other hand, is employed in three different ways: utilising Messenger, Facebook groups, and the Facebook search function. TAN utilises Facebook groups to identify, approach, and nurture business leads. LinkedIn also plays an important role in the multiple touch points of the sales pipeline with TAN developed messaging.



The Referrals Campaign focusses on generating referrals for further Business Features. Referrals usually come from clients who refer based on the results of an effective service. It's highly unusual to be able to generate referrals from prospects given they haven't had the same experiences compared to a long term client. However, TAN has integrated a proactive referral strategy into the process of delivering it's trademark Business Features. This allows other businesses to be nominated for a business feature providing an additional stream of referral leads.

All the marketing campaigns have been designed with simplicity and effectiveness in mind. It is important to note that numerous marketing tactics and strategies have been tested before settling on the campaigns outlined above.



MEET THE NETWORK

Colin Potts

Before joining TAN Colin had a strong operations and sales background putting into practice his MBA.

He had a very big health scare in 2013 that gave him a totally new perspective on life, and especially what we all do everyday to not only earn a living, but also how we can make a difference.

This experience inspired Colin to work with business owners who have a desire to grow and succeed, but not at the expense of their health or family situation.

He still consults to corporate clients but tells us there's nothing that beats the speed at which a small business can be optimised and the impact that has on an owner's family, team, and community.

Over 6 years with TAN, he's worked with many family businesses where he's found a huge sense of satisfaction with the turnaround in results, and the gratitude from his clients has him saying "I want to do this forever!"

When Colin's not with clients, he's with his family and when he's not with his family, he's a huge music fan and is happiest when he's at a concert buried in a mosh pit.

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The Appointment Process

When a contact responds to our marketing campaigns, they agree to the scheduling of an appointment.

This transitions the contact into the sales stage with a one-on-one meeting internally referred to as “Triage”. The purpose of Triage is to engage in an open discussion with the business owner regarding their origin story, as well as details of what they do and who they help. During Triage, there is no pressure to make a sales pitch, instead its purpose is to get to meet one another with sufficient time to establish meaningful dialogue between both parties.

Following Triage, if a key opportunity or problem is identified, the business owner is offered the chance to participate in a “Boardroom” session. The Boardroom session typically lasts between 60 to 90 minutes and covers nine critical areas of the business. It is designed to facilitate in-depth discussions and analysis.

Overall, the Triage and Boardroom stages of the client onboarding process offer a systematic approach that allows for thorough assessments to be carried out by both advisor, and business owner, and ultimately leads to a successful client acquisition.



In approximately one out of every three cases, the Boardroom session will lead to a successful conversion and the acquisition of a new client. However, as advisors gain experience and proficiency, conversion rates improve to two out of every three boardroom sessions producing new clients.

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The Online Tools

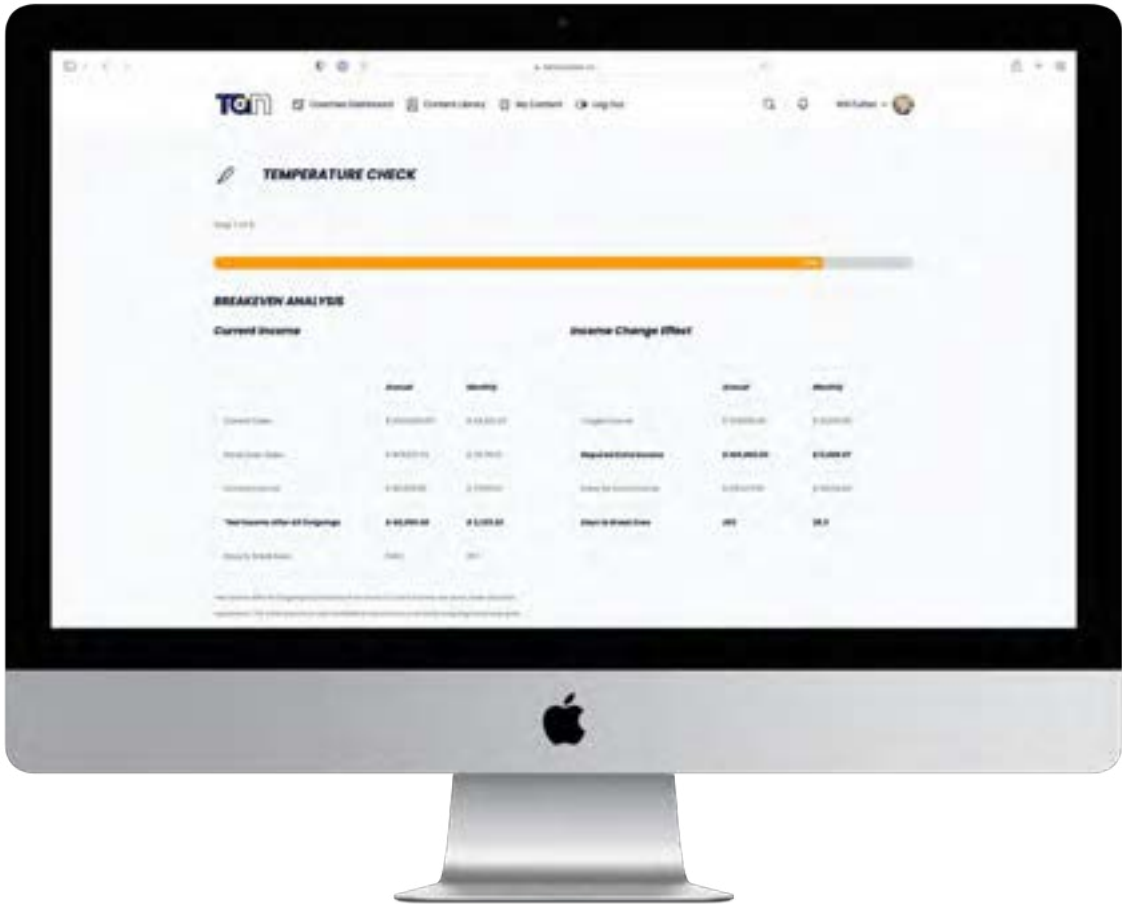
TAN offers a Profit Leakage Calculator as a unique and valuable online tool.

This is an exclusive tool developed by TAN over a span of 15 years. It provides unique insights and is tailored to support TAN advisors to find the easiest opportunities for business growth. The more ‘leakage’ found, the more compelling the business case for starting a program. Likewise, higher program fees can be achieved when advisors are able to quantify the cost to the business if the owner continues trading without the assistance of an advisory program.

Other online tools developed by TAN include a business plan generator that can be customised according to specific strategies that match the needs of the client. There is also a Client Report Summary, which provides advisors with key data extracted from each client’s business.

‘Cue-cards’ are another important tool used during interviews with potential clients while networking or delivering business features. These cue-cards effectively deliver your elevator pitch and keep you on track to ensure you identify key ‘hot buttons’ that resonate with each individual business owner.

TAN also provides behavioral profiling tools that enable advisors to evaluate important attributes for owners together with their teams. TAN has developed a specialised "Leader Profile" that adapts these profiling techniques specifically for SME business owners. These tools contribute to a comprehensive and effective approach to understanding and supporting client success.



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The Coaching Skillset

Coaching skills are often overlooked as a primary skill required for professional advisory roles.

However, without these skills, advisors tend to engage in over-servicing their clients by doing work on their behalf. It is common for clients to attribute their lack of implementation to simply being too busy.

The success of the TAN business model relies on clients taking responsibility for their own implementation rather than relying on the advisor. Many consulting models ignore this issue, whereby value is only evident when the consultant is positioned as a subject matter expert and therefore needs to be involved in all aspects of the implementation of their recommendations.

In the TAN model, the client is given expert advice of what to do, shown how to implement the tasks using worksheets and templates, and then coached to complete the implementation.

Hence when clients fail to complete their assigned tasks, it becomes the advisor's role to coach and guide them.

Advisors are trained in coaching techniques to effectively support their clients. Coaching involves utilising a structured set of questions designed to promote accountability and prevent clients feeling judged or criticised by their advisor.

Comprehensive training on the use of coaching skills is provided within the TAN system. Advisors are therefore equipped with all the necessary skills to facilitate client growth and development, ensuring a holistic approach to their advisory services.

At TAN, coaching skills are recognized as essential for a well-rounded advisor.



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The Business Success Program

The client journey begins with an Alignment Session, where their goals are aligned with key projects.

The next step involves evaluating the business using key data and metrics to develop a comprehensive plan. Once the plan is in place, the TAN Business Success Program is implemented.

In the initial 90 days of working with a client, the focus of the TAN program material is on "fee-finding." This means delivering tangible results that have a positive impact on the client's bottom line within the first three months. Meeting this target is a significant milestone for the advisor within the TAN system.

Once the advisor has successfully achieved the fee-finding milestone, the ongoing program becomes effectively free for the client. This is done to provide no reason for the client to discontinue their engagement and encourages them to stay indefinitely. With the fee-finding phase complete, the advisor and client can collaborate on implementing all aspects of the business plan.

The TAN program material covers various facets of business development, including margin optimisation, cost reduction, productivity improvement through KPIs and team sessions, sales training, templates, and techniques. As the partnership between TAN and the advisor progresses, scale opportunities such as mergers and acquisitions, exit planning, and other strategic initiatives are explored.

Throughout the process, TAN provides program materials and templates to support each part of the plan. However, advisors are also encouraged to leverage their own experience and resources. The ultimate success of the client comes from the collaborative partnership between TAN and the advisor, working together to achieve the client's goals.

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The Value Proposition

The TAN value proposition is presented to clients during the Boardroom Session.

The business is systematically divided into nine areas that encompass all aspects of its operations. Each of these areas is evaluated and quantified to determine their "profit leaks," which are then compared to the program fee to establish the return on investment (ROI). Once the ROI has been calculated, a business case becomes self-evident.

Once the business case has been agreed, the selection of the appropriate program can now proceed. TAN offers three continuity programs, all based on a monthly retainer basis. The Bronze program caters to micro businesses with 1-3 employees, starting at \$1,500 per month. The Silver program targets businesses with 3-30 employees being managed by the owner, priced at \$2,500 per month.

The Gold program is designed for larger businesses with management teams, starting at \$4,000 per month.

The frequency of session delivery times can vary for the Bronze and Silver programs, however fortnightly sessions are the norm. Advisors have the flexibility to choose between online or in-person delivery, and the pricing structure reflects their preferred mode of delivery. Bronze programs often operate as online-only sessions, lasting for 60 minutes.

It's important to note that delivery options and prices provided are guidelines and can be adjusted as needed to accommodate specific requirements.

MEET THE NETWORK

Nigel Standish

Prior to becoming a Business Coach, Nigel held several CFO roles for multinationals in the publishing & media space

As a qualified CA, Nigel has been able to use his expertise to develop a 'financial roadmap' for use with his clients.

He has an extensive and diverse client base & currently has a waiting list!

Several years into his Coaching journey, Nigel is currently working on developing a scale model to offer his financial roadmap to a wider audience.

Outside of the Boardroom, Nigel has a keen interest in politics and is an avid sportsfan of AFL, cricket and golf.

Nigel describes himself as a 'recovering accountant who's learning to drive a ride-on mower.



Nigel Standish getting photo-bombed by his significant other out on the greens in Queenstown

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The Delivery Platform

TAN has developed a purpose-built platform specifically designed to deliver the business success program.

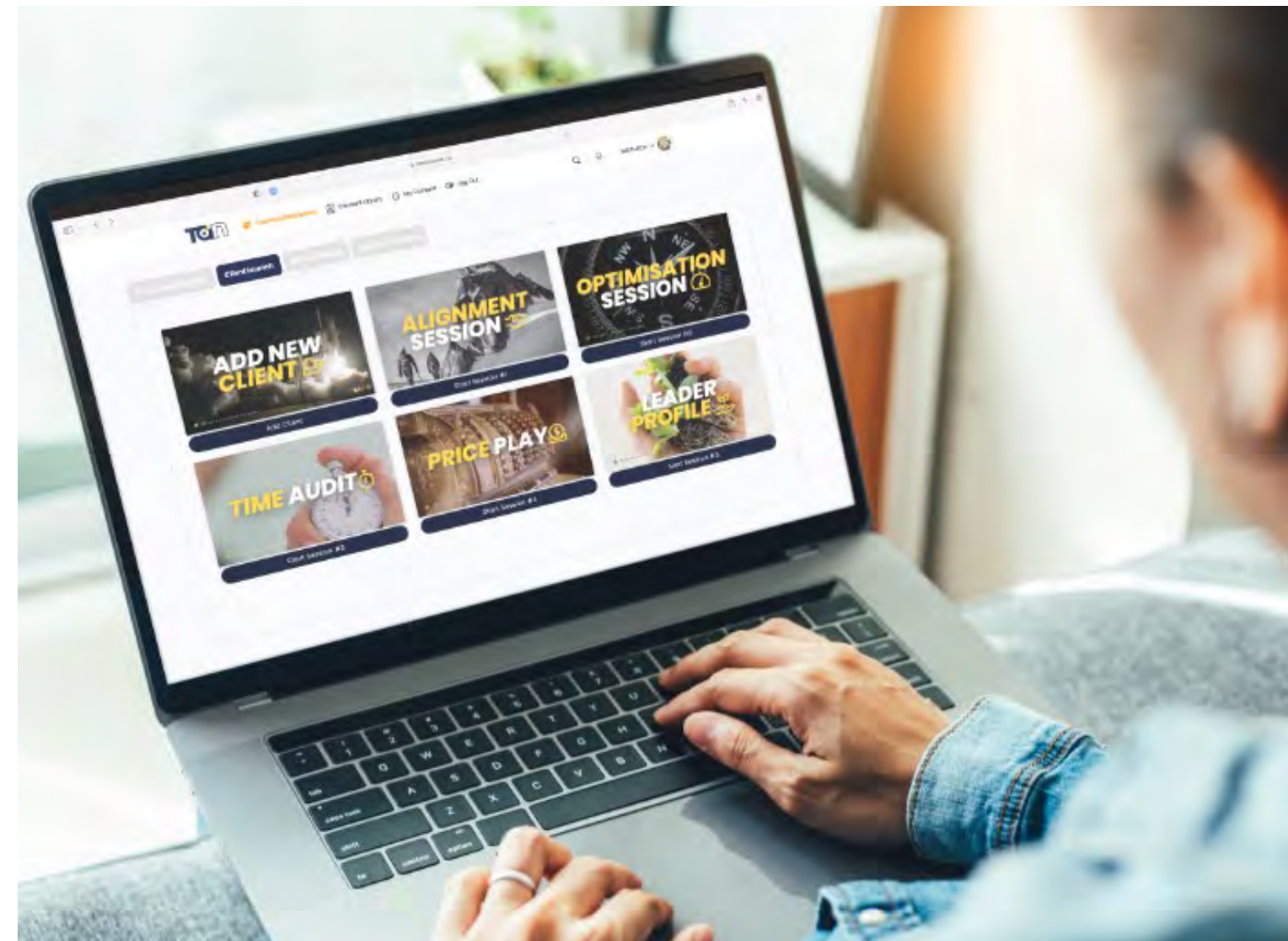
This platform enables advisors to efficiently organise their content and client sessions with the objective of minimising the need for follow-up after each session. By streamlining the process, advisors can effectively manage a larger number of clients simultaneously.

The platform includes features such as automated reminders sent to clients prior to sessions to ensure progress has been made as well as establishing the agenda for the upcoming session. Task lists can be assigned and completed transparently, facilitating accountability and progress tracking. Additionally, session notes can be stored and retrieved, providing a comprehensive record of client interactions.

A notable aspect of the platform is its pre-session planner, which assists advisors in organising their content and materials for each session. All program material is housed on the same platform and indexed according to their respective functions.

One of the key features of the platform is the client "Win's Bank," which quantifies the program's return on investment (ROI) by tracking and highlighting client successes.

The platform is versatile and can be utilised for both one-on-one and group delivery to clients, whether in-person or online.



It offers a centralized and efficient solution for advisors to deliver the Business Success Program effectively.

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The Scale Opportunity

After establishing a solid client base of local clients, the opportunity to scale arises.

Advisors have the option to explore scale opportunities through single avatar group programs e.g. Trade Based Businesses or Logistics Companies etc. The interest in pursuing such programs varies among advisors based on their individual preferences and level of ambition (many are happy to consult to local clients and pick up referrals rather than choosing to scale).

Scaling programs require a comprehensive and refined marketing strategy, which TAN provides specialised training on. Advisors are taught how to build and manage their marketing efforts given the different style of marketing necessary for targeting single avatars.

Additionally, TAN offers support by building landing pages and social platforms to facilitate the scaling process.

Further scale opportunities can be found in high-value client agreements. TAN provides guidance and program agreement templates for advisors who can incorporate percentage-based success fees into their client agreements. This opens the door to additional income possibilities.



It is worth noting that many unique scale opportunities exist, and advisors only encounter such opportunities once they're in the marketplace.

MEET THE NETWORK

Lana Ratapu

A long history as a Business Coach, Lana joined TAN to spend more time on client delivery and client acquisition rather than being stuck building program material and marketing content.

A Business Coach for many years now, Lana is a certified and Master Practitioner of Neuro-Linguistic Programming techniques & specialises in Personal Development with her clients.

With a passion for travel, Lana has chosen to run her business exclusively online allowing her the flexibility to work from anywhere.

She currently works between Australia and Canada depending on time of the year.

Lana balances work with being a music lover, a part-time wine connoisseur and is the beloved owner of her cat - Charlie Parker.



COMMUNITY

In the development of TAN's tools and training, collaboration with the network has played a pivotal role. By actively involving advisors in the process, TAN ensures that its resources are tailored to their needs and draw from the collective expertise of the community.



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The TAN Community

Every Monday, TAN advisors gather to receive training and mutually benefit from each other's knowledge.

This collaborative learning environment fosters growth and development within the network. Additionally, TAN maintains a closed Facebook group where advisors can share their wins, exchange tactics, and support one another.

TAN organises two conferences annually. The first is held online in the middle of the year, while the second is an in-person event at the end of the year. The conference themes are selected based on areas that hold significance for the network. Conferences also provide the platform for launching new marketing initiatives, program material, and highlighting the best results from individual TAN members.

This approach means that conference content is relevant and valuable to all participants.

In the development of TAN's tools and training, collaboration with the network has played a pivotal role. By actively involving advisors in the process, TAN ensures that its resources are tailored to their needs and draw from the collective expertise of the community.



This collaborative approach empowers advisors to assist one another, share success strategies, and collectively thrive within the network.

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The Interview Process

Upon reading this Prospectus, you will gain a clear understanding of how TAN operates and the opportunities it presents.

You will also have the opportunity to complete TAN's "Advisor Profile," which has been specifically developed to provide valuable insights. This is made available once you book a Discovery Meeting to discuss the opportunity in more detail with us.

Following an initial discussion, you will have an interview with Will Fulton, the founder of TAN. We suggest that you attend this interview with any 'significant other'. This interview serves as a means to assess the compatibility between you and TAN, ensuring a good fit for both parties. If the fit is established, you will be introduced to other members of the TAN community, further expanding your understanding of the network culture.

The discovery process is designed to maximise the likelihood of success, ensuring that both parties can collaborate effectively. Once the decision to start with TAN is reached, you will be granted access to the training portal.

Training commences immediately, and your 90-day launch period begins. Completion of this launch period is deemed successful when you have achieved a minimum of 3 premium clients. This milestone leads to an offer of full membership to TAN acknowledging your dedication and progress with the initial launch phase.

Full membership comes with a more comprehensive CRM upgrade that integrates a nurturing campaign as well as full participation in the TAN community training events including Monday professional development training as well as conferences etc.

The decision to join TAN is mutually made, as it requires a shared commitment and a strong working relationship.

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The TAN History

In 2005, Will Fulton recognised the need for professionalisation in the Business Coaching industry.

During that time, the coaching industry lacked financial tools and primarily relied on verbal communication techniques and templates. He teamed up with a software developer (one of his clients) and embarked on building software specifically for the Business Coaching industry.

He went on to market his software to coaches worldwide, demonstrating to the coaching community how to integrate financial analytics and advisory into the client experience. He pioneered the idea of “fee-finding” whereby a primary skill of a business coach should be the ability to produce a financial outcome for the client that pays for the service they were receiving within 90 days. To this day the techniques he has taught over 20 years have been followed by hundreds of coaches and consultants all over the world.

His focus on financials had him decide to depart from the coaching franchise he was part of and launch his own consulting franchise with two other business partners.

After six years of franchising and growing the network to over 120 franchisees in 4 countries, he sold his shares. He observed the need to keep program material and marketing techniques up-to-date which proved difficult with the rigidity of a franchise model. He also perceived franchising as an unfair business model burdened with high upfront costs.

In 2014, during a training event in New York, Will Fulton encountered Charles Green, whose teachings greatly inspired him. Subsequently, he launched a new venture called the Trusted Advisor Network (TAN) in 2015. TAN adopted a membership model with affordable upfront costs and continual program development.

With two decades of experience as a practicing coach, consultant, advisor, and trainer, Will Fulton brings a wealth of expertise to those in his network many of whom he considers close friends.





MEET THE NETWORK

Natalie Sammons

A qualified Chartered Accountant, Natalie left a successful accountaing career with a large firm to become a Business Coach...

Natalie is highly entrepreneurial and recently purchased one of her clients' businesses. She hired back her client as the manager and together they have systemised the business, installed KPIs, and filled the salon's calendar with high value target clients.

One of the longest standing members of the TAN Network, Natalie works with her clients delivering a mix of financial advisory, coaching & consulting.

Natalie's lifestyle as a Business Advisor has allowed her to balance her professional work along with raising her young family.

Little known fact about Nat... she's an alum from the Australian Institute of Sport for her mad netball skills

Left: Natalie Sammons taking on the rapids in ACT with her family

Being a member of TAN entails an ongoing commitment to learning. Recognising that knowledge and growth are continuous, individuals within TAN make a conscious decision to embrace a lifelong journey of learning and development.

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The TAN Philosophy

SME businesses require a combination of coaching and consulting disciplines to achieve success.

Merely focussing on business development through consulting disregards the importance of coaching. Similarly, solely emphasizing personal development through coaching overlooks the tactical aspects of consulting.

To deliver success as a "Trusted Advisor," one must possess fluency in both coaching and consulting disciplines.

It is the integration of these two approaches that enables effective guidance and support.

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The 7 Points of Culture

PERFORMANCE: High performance is not only our responsibility, but also an expectation that we have for ourselves as individuals, our network, and our business community. We believe our individual performances translates directly to our impact as advisors. Furthermore, we constantly strive to improve our individual performance knowing that it is a duty we have to ourselves and the people we care about. This means we consistently challenge ourselves to perform the tasks required to succeed on a daily basis.

COMMITMENT: We are 100% committed to doing whatever it takes to succeed as a TAN business advisor. We do what we say as our word is our bond. We stay focussed on our goals and objectives knowing that success comes from commitment and follow-through rather than from an individual talent or trait. We have strong discipline around, not only our tasks and actions, but more importantly our internal thoughts and external attitudes.

IMPROVEABILITY: We hold a constant and never-ending belief that every business, every person, every situation can always be improved, contributed to and assisted to perform at a higher level. This translates to an unerring faith that by working together on a problem or an opportunity, there will always be significantly better outcomes by working together. We hold this belief as a constant in every conversation we have as professional business advisors.

COLLABORATION: We work together with each other as a network knowing that we are stronger together than we can ever be individually. We believe in an abundance of opportunities that grows exponentially as we collaborate. We participate in all collaboration opportunities knowing that a "Blinding Flash of the Obvious" (BFO) can come at any time that will benefit ourselves and the clients we serve. We support each other, celebrate our wins and function as a team.

INNOVATION: We provide innovative, accessible, practical and relevant content because we believe that business development should be fun, visual and simple to engage with. We make no apology for introducing new material because it's our role to be progressive. This means as advisors we are constantly in a state of learning and updating our skills.

CONSISTANCY: We practise what we preach. We respect and acknowledge that systems produce consistency and we therefore seek to adopt TAN systems before looking for adaptations or external options. We consistently communicate positively about each other and our network and support every aspect of our collective efforts to grow our network with new clients and new advisors.

ACCOUNTABILITY: We hold ourselves accountable for our actions. We are open to feedback and give and receive it without judgement or ego. We take responsibility when we receive feedback and seek to hold ourselves to the highest standards of ethical and professional conduct. We are quick to apologise when we acknowledge an issue and don't listen to gossip or engage in negative discussions. We are authentic and transparent in our communications at all times.



MEET THE NETWORK

Gerry Gallagher

Before joining TAN, Gerry was a consultant in his own consulting firm but saw the opportunity to develop longer-term engagements with clients using TAN training and systems.

Gerry had plenty of consulting experience but was new to the practice of coaching techniques.

He saw TAN as an opportunity to move away from project-based consulting gigs and made the move into ongoing continuity programs with clients that are happy to work together for 2-5 year engagements.

He also had an interest in developing marketing campaigns that brought in clients outside of the traditional tendering and quote-based consulting projects.

Having developed new marketing and coaching skills, Gerry has been able to transform his client servicing building a strong base of businesses that get the benefit of his extensive experience.

When Gerry's not with clients, he can be found jet-boating, fishing and golfing as well as enjoying the Summer in his restored circa 1970s caravan.

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The TAN Investment

An investment in TAN membership is to agree with two ideas that ‘the sum is bigger than the parts’ as well as ‘no point re-inventing the wheel’.

It also respects the notion that paying for advice and expertise is a valid use of funds, together with respecting the cost associated with not having specialist help to produce a high-performing commercial venture. It is exactly this decision to invest in expertise to build a better business that you’ll be asking your clients to make when they sign your agreements.

That said, TAN shares the same philosophy of ‘fee-finding’ that advisors have with their clients. Hence the proposition of ‘one client pays for all TAN membership’. This translates to the following process of financial engagement:

An upfront amount for establishment is required, which spans over a duration of a 90 day launch period. This covers the facilitation of comprehensive training and an online Learning Management System addressing all aspects of the training process. In addition to this, the marketing and sales disciplines incorporate an in-field training component, ensuring practical application of what has been learned.

Field activities are integrated with each system component to ensure the techniques and disciplines have been applied and locked in. A Progress Tracker is provided, listing all the necessary tasks for the first four weeks. For weeks 5-13, the tracker specifies Key Performance Indicators (KPIs) based on field activity requirements for each week.

To enhance the learning experience, a weekly Launch Session is conducted with a TAN expert who focusses specifically on appointment setting. For personalised assistance, 1:1 guidance is available to address any questions and provide additional support.

The upfront investment also includes a comprehensive Tech Package, which forms a crucial part of the launch process. This package encompasses essential online elements such as a website, CRM system, social media pages, graphics, and more. Full pricing of the above is covered in your 1:1 interview once you’ve read this Prospectus and viewed the relevant TAN collateral such as Advisor Profile and video content.



Next steps are to:

If you've read this Prospectus, feel excited about the idea of working with business owners and think you're a good fit, then the following steps will give you further information on this business opportunity.

1. Complete your application questionnaire to provide TAN with your background
2. We'll put you in touch with a member of the TAN network so you can hear from people who have been in the same situation as you i.e. looking for the next step in their career, what the options were and how the decision to enter the business advisory space has worked out for them
3. Then you'll be invited to complete an Advisor Profile prior to your interview with TANs founder.
4. Your interview will then be scheduled with TANs founder for 60 minutes (we suggest you attend this interview with a 'significant other' who would likely be impacted by your decision to become a professional business advisor.

We trust you now have a clear understanding of the TAN business opportunity and we look forward to speaking with you further...



Will Futton