



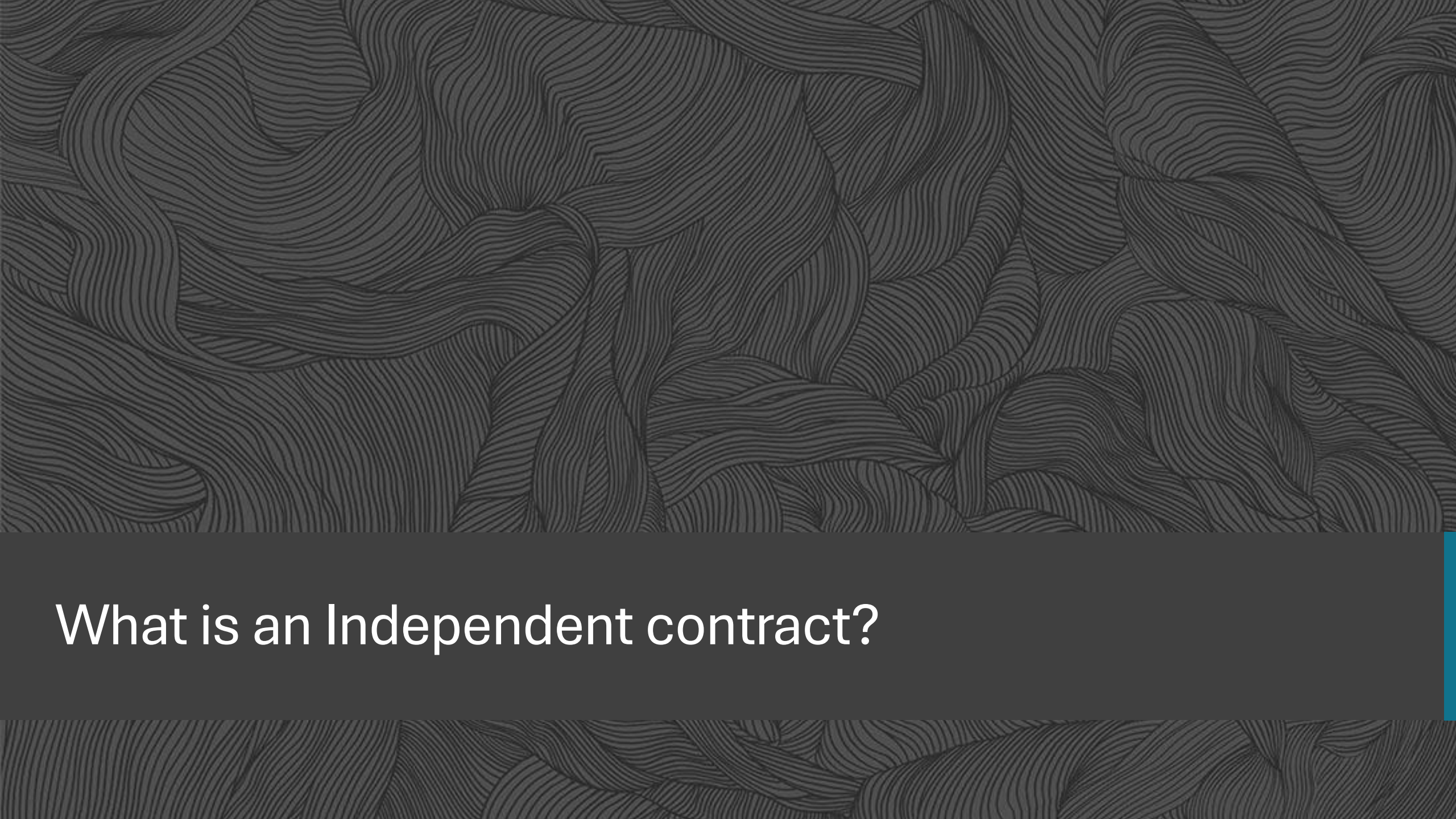
JACO STEENBERG



The Power of a Referral Partnership

Why a Real Estate Agent Benefits from Partnering with a Financial Adviser





What is an Independent contract?



Benefits to the Real Estate Agent

- Add value beyond the property transaction.
- Offer clients access to a trusted financial professional when appropriate.
- Strengthen the agent's position as a long-term property and lifestyle adviser.
- Create a natural reason to stay in touch with past clients.
- Build a professional network that can generate reciprocal introductions.
- Differentiate from agents who only focus on the sale.





A Better Client Experience

- Clients often have questions about affordability, debt, cash flow, risk and long-term goals.
- Instead of trying to answer financial-planning questions outside the agent's expertise, the agent can make a professional introduction.
- The adviser provides specialist guidance while the agent remains focused on the property transaction.
- The result: a more complete support network around the client.



The Referral Flywheel

- Agent delivers a great property experience
- Client receives additional value through a trusted introduction
- Financial adviser builds a new professional relationship
- Client feels better supported
- Stronger trust increases the likelihood of future referrals
- Agent and adviser can build a mutually beneficial professional network

OLDMUTUAL

THANK YOU



WEALTH

Old Mutual Wealth is brought to you through several authorised Financial Services Providers in the Old Mutual Group who make up the elite service offering.



JACO STEENBERG

