

# Your *journey* with MoneyQuest



# What's on your Quest?

## Onboarding & Accreditations ○-----○ 1

Congratulations you have signed your Franchise Agreement and the process of onboarding begins! You will receive a Welcome Pack that explains the process in detail, including a list of what is required from you and time-frames as to when each step will take place.

## Induction Training ○-----○ 3

Our induction training involves a face-to-face program at our Melbourne head office, or a virtual option via zoom when travel is not possible. It includes being introduced to the team, completing any onboarding requirements that have not yet been finalised, reviewing your business and marketing plan, introductions to lender BDM's and solutions product providers and training sessions on credit, compliance, social media, lead generation along with the MoneyQuest dashboard.

## Mentor Program ○-----○ 5

If you have less than two years experience in mortgage broking you will require an experienced mentor for the first two years of operation. Your mentor will be introduced to you in month one and following a detailed mentor program, assist you with anything and everything to ensure that you have the knowledge required to be a successful mortgage broker. Brokers with over two years of lending experience are not required to have a mentor.

## Field Visits ○-----○ 7

The MoneyQuest Franchise Development Team (FDT) will be your go-to for any assistance that you require in the development of your business. They can assist with lender issues, marketing plans, business forecasting and anything else you may require help with. The FDT is always on call for when you need them but will also work out scheduled times when they will check in via field visits or video conference.

## STEEL ○-----○ 9

At MoneyQuest we understand the importance of continual learning and improvement and that's why we have developed a program called STEEL:

**Supplier Training Education Engagement Learning.**  
With the lending landscape constantly changing we have organised monthly meetings with our lender partners on the last Wednesday of every month. The program educates, allows you to ask questions and learn with your peers.

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## ○-----○ eAcademy

Once your Franchise Agreement has been signed you will receive a login to the MoneyQuest eAcademy where you can complete the online induction training which must be completed. This detailed course was created by Michael Russell and a successful former mortgage broking franchise owner come adult educator. It will help you learn the nuts and bolts of the MoneyQuest franchise system, how to write a compliant housing loan, and how to generate leads to grow your franchise.

## ○-----○ Compliance Coaching & Support

Our compliance team support you every step of the way. Adopting an educational and consultative approach to compliance, focusing on ongoing guidance and training to minimise knowledge gaps and effectively manage risk. Our readily accessible team constantly keep our brokers up to date with changes in the law and best practice.

## ○-----○ Your Business Matters

Your Business Matters is a fortnightly meeting run by the MoneyQuest Franchise Development Team. There will be a different agenda for each meeting and it's a chance to network with the other MoneyQuest Franchise Owners and discuss any processes, issues, scenarios or tips with each other.

## ○-----○ Tribe

You'll be invited to join a Tribe that consists of a small group of your MoneyQuest peers. Together you will meet online or over the phone to discuss strategies and solutions to help support the growth of your business.

## ○-----○ FitBiz90

Towards the end of your first two years you will begin FitBiz90. A 90 day program which was created by Michael Russell and outlines a comprehensive three month strategic plan.



# Hear what our successful MoneyQuest franchise owners have to say...

“Last year I made the decision to move from one of the major banks and become a mortgage broker. I wanted to run my own business and draw on the skills I've learnt from my years in the finance industry already. I chose broking because it offered flexibility and autonomy and was a nice crossover for my skills.”

- Jimmy Christou  
MoneyQuest Epping

“I owned a real estate franchise for a number of years and after a short break to have kids I am so glad I made the decision to invest in a MoneyQuest franchise. Unlike my previous business, I was pleasantly surprised at the amount of creativity and freedom that MoneyQuest allows me to have. There is a great deal of flexibility in terms of hours and I love that it's not a typical working week. No client or scenario is the same, so it's constantly changing and interesting. I love working with the head office team and seeing my ideas come to life. I wouldn't look back!”

- Michelle Harvey  
MoneyQuest Ringwood

“As small business owners, we decided to write our own story and be captains of our own destinies. As members of MoneyQuest, we have never felt small or alone. Help and support are never more than a phone call away. We are part of something bigger, the MoneyQuest family.”

- Matt Chik & Scott Seng  
MoneyQuest Balwyn



Visit our  
website!

Ready to take the *next* step?  
Contact Julian today to find out more!

Call 1300 886 137 or email [franchise@moneyquest.com.au](mailto:franchise@moneyquest.com.au)



# Your two year Quest

Learning Task	Months																							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Onboarding and Acreditations	•																							
Induction Training	•																							
Compliance Coaching and Support	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
eAcademy	•																							
Mentor Program	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Your Business Matters			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Growing Your Business			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Field Visits						•						•						•						•
STEEL	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Tribe	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
FitBiz90																								•

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**Key**  
1 = January Year 1  
14 = February Year 2