

Spend time where it matters – building client relationships – not formatting advice documents.

Midwinter's Advice Documents module provides three different options, so advice Practices and AFSLs can get the level of customisation and management they require, at a cost that suits their business.

The standard and managed advice document templates have been created based on years of customer feedback and provide a simple, best-practice advice document solution. These templates have been reviewed by a financial services law firm and are regularly updated in line with legislative changes.

Standard Advice Documents

The Standard Advice Document templates are available to all AdviceOS customers at no additional charge. Basic configuration can be done in the AdviceOS settings.

This option is suitable for smaller Practices and AFSLs that want an out-of-the-box solution and don't require customisation.

Managed Advice Documents

Managed Advice Documents provides additional customisation to the standard advice document templates for a low monthly fee.

Included documents:

- SOA
- ROA
- FDS
- Fact Find

This is a great option for Practices and AFSLs looking for a simple way to manage their advice documents at an affordable price.

Custom Advice Documents

Custom Advice Documents provides one-off customisation services or a fully customised template, developed by Midwinter's expert templating team on a statement of work basis.

This is perfect for large Practices and AFSLs that need a fully customised solution.

Customisation options

	Standard Advice Documents	Managed Advice Documents	Custom Advice Documents
Customisation to Summary and Disclaimers			
Customised Legal disclaimers		●	●
Customised Fee disclosures		●	●
Customised Executive summary		●	●
Ongoing Legislation and Tax changes			
Configuration		●	
Template updates		●	
Ongoing Enhancements			
New features updates and recommendations from Midwinter		●	
Updated advice text		●	
Custom Formatting			
Styles and Themes*		●	●
Table formatting		●	●
Logo and signatures			
Logo	●	●	●
Signatures	●	●	●
Risk profile			
Risk profile and descriptions	●	●	●
Configuration (i.e. additional text and graphs)		●	●
Automations (i.e. sections based on risk profile)		●	●
New recommendations and advice text			
Adding new recommendations			●
Change in structure of the template			●
Additional advice text and links			●
Special words			●
Custom fields			●

*Excludes charts and graphs

Contact us now to get started.

Email sales@midwinter.com.au or

Call **1300 882 938**

Advice Documents is available as part of Midwinter's comprehensive advice software AdviceOS.