



## PETER KENNEDY CONSULTING

### ABOUT

Peter is an esteemed financial services and property expert with over 30 years' experience. Consulting for high net worth individuals, small businesses and families, Peter has amassed an impressive client base.

He has previously held roles with ANZ, St George and AMP. He was on the Australian board of advisers for St George Bank's broker division and is an active member of industry bodies such as the Mortgage and Finance Association of Australia. Peter also lectures in financial services.

#### Qualifications

- Diploma of Financial Services (Financial Planning)
- Diploma of Financial Services (Finance/Mortgage Broking Management)
- Certificate IV in Real Estate (Real Estate Agents' Representative)
- Certificate IV in Training and Assessment



### PROPERTY ADVICE

Peter is a qualified real estate agents' representative and can assist in both buying and selling property. Peter's buyers advocacy services range from general advice entering the market or expanding your property portfolio through to full-service options including property selection, inspections, purchase and negotiation. Peter helps his clients buy new or established properties that are best placed to yield the strongest capital growth for the investment amount available.

As a vendor's advocate, Peter can work with you to select the most appropriate agent for your needs and to ensure their services are deployed in your best interests. He can also assist financial services professionals to confidently discuss property matters with their clients.

### FINANCING

As an experienced mortgage broker, Peter works to structure your financing requirements according to your individual situation. This means ensuring not only the best rate, but the best product and lender for your needs. Getting your mortgage to settlement can be a complex and difficult process and Peter's long-standing experience puts you in the best position to achieve a stress free settlement.



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PROPERTY - FINANCING - EDUCATION - MENTORING



## MENTORING

Peter will utilise his experience and networks across mortgage broking, financial planning and property to assist you being a broker with a point of difference. Over the two year mentoring period you will cover:

- Creating the best model to suit you
- Selecting an aggregator
- Setting up the requirements for a new broker
- Lender accreditations
- Tailoring your business plan
- Marketing and your social media presence
- Mortgage sales process
- Software training
- Relationships with key parties (eg BDMs)
- Compliance
- Professional development
- Diversification (eg equipment finance)

Monthly sessions will be scheduled and Peter is also available via phone or email for support.

## SEMINARS AND EVENTS

For more than 20 years Peter has presented and been the master of ceremonies at seminars and professional development days. The **Peter Kennedy Insight Series** is a bespoke suite of seminars designed around key life events such as first-time buying and investing, establishing self-managed super funds and assisting children to enter the property market. Seminars are designed to improve people's financial position for both personal and business situations.

Depending on the topic, Peter will work with and utilise your existing professional network as potential guest speakers or engage one of the many professionals in his own network (fees apply). Peter designs the session, performs the role of master of ceremonies and presents on topics within his expertise. He applies a set format that has been used successfully for many years, which keeps the seminars relevant and engaging.

Fees for the Insight Series include consultation and coaching session with your staff on topic selection, customisation of content to suit the practice, maximising attendance and understanding the benefits for clients.

## FEES

Contact us at Peter Kennedy Consulting to discuss our professional charges and service fees. Your initial consultation is always free, so we can discover how Peter Kennedy Consulting is best placed to help you achieve your goals.



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