



BUILT BY ADVISERS, FOR ADVISERS

Experience the Shartru Wealth Difference.



EMPOWERING ADVICE.



Shartru Wealth provides an outstanding, comprehensive support platform meticulously designed for financial advisers like you. Because we're not owned by a bank or large institution, our focus remains solely on your needs. We understand the daily operational and regulatory challenges you face because our leadership team walk in your shoes as practising advisers.

Our primary goal is to significantly save you valuable time and operational resources, freeing you up and empowering you to concentrate fully on what truly matters: delivering exceptional, client-focused advice.



WHY CHOOSE SHARTRU WEALTH?



01 Flat Fee Structure

Gain financial certainty with our flat annual fee structure. Unlike percentage-based models where licensee fees escalate directly with your success, our approach ensures your costs remain stable, allowing you to retain more of your hard-earned revenue as your business flourishes. This transparent model offers a compelling, cost-effective alternative to the significant financial outlay, administrative burden, and complexity associated with self-licensing.

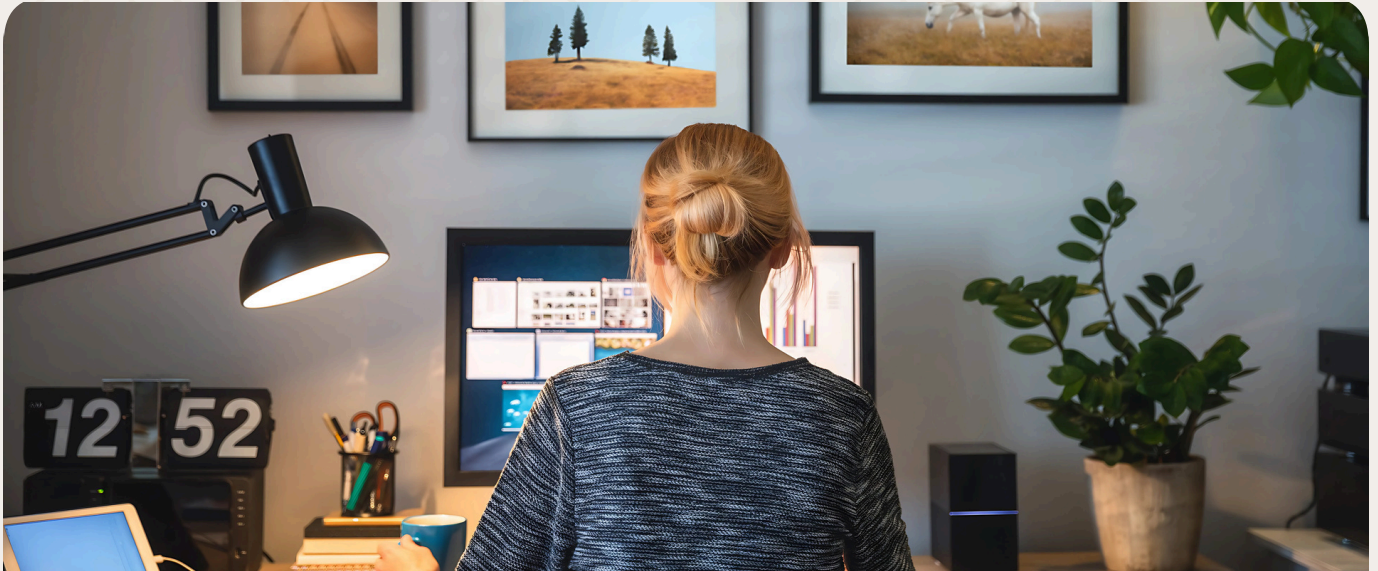
First adviser: \$31,000 p.a. + GST (Subsequent Advisers: \$10,000 p.a. + GST).

02 Practical, Common-Sense Compliance

Experience a compliance framework grounded in practical application and common sense, not just rigid box-ticking. We focus intently on the key legislative and regulatory requirements to ensure the delivery of high-quality, compliant advice, thereby protecting you, your clients, and your business's reputation.

Our support includes robust templates and resources, essential pre-vetting support during your transition, and direct access to a dedicated compliance team ready to answer your questions.

WHY CHOOSE SHARTRU WEALTH?



03 Independence & Flexibility

Operate with true independence within a boutique AFSL environment, completely free from the influence of product providers. Our Approved Product List (APL) is curated based on quality and merit, not institutional ties, giving you confidence in your recommendations.

You retain the freedom to brand and market your practice according to your vision. Furthermore, we maintain a solutions-agnostic philosophy, meaning we are always open to collaboratively evaluating new strategies or products you believe will benefit your clients. Shartru Wealth has an Investment Committee which meets at least monthly and provide monthly & quarterly webinars with detailed reports to our network of advisers.

04 Comprehensive Support & Resources

Your core fee encompasses essential tools vital for modern advice practices, including access to XPlan CRM and Think Caddie for streamlined Continuing Professional Development (CPD) management. Our 24/7 adviser portal, SWAN (Shartru Wealth Adviser Network), serves as your central hub for licensee updates, compliance documents, training materials, and lodging support requests.

To further enhance your efficiency, we offer a suite of optional, user-pays services including professional paraplanning, administrative assistance, specialised SMSF support, and targeted marketing assistance, allowing you to tailor the support you need to effectively streamline your practice.

WHY CHOOSE SHARTRU WEALTH?



05 Community & Expertise

Become part of a supportive, nationwide network of like-minded, professional Advisers. Share insights, challenges, and successes with peers who understand your world.

You also benefit directly from the insights of our experienced Investment Committee, which is available to you to discuss the products on the APL. Advisers are encouraged to participate in our program of regular training, informative webinars, and valuable national conferences.

06 Investment Advice

The Investment methodology undertaken by our investment committee is broadly termed "The Shartru Way" and focuses on risk adjusted returns and is built for clients that are looking to reduce the level of volatility in their portfolio. We are focused on the individual's goal and objective not generic benchmarks or outcomes.

WHY CHOOSE SHARTRU WEALTH?



07 Commission

Benefit from reliable weekly commission payments each Thursday.

Our accessible commissions team is available via email, phone, or the adviser intranet to support your needs.

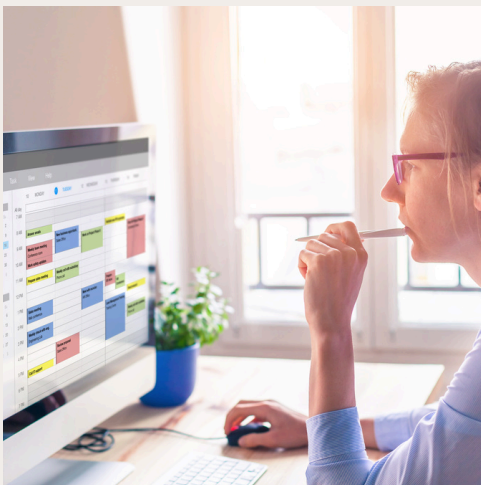
Monthly license fee deductions offer flexibility, allowing you to be invoiced directly or have the fee deducted from your commissions.



READY TO EMPOWER YOUR ADVICE?

Take the next step towards greater efficiency and autonomy.

Discover how partnering with Shartru Wealth can effectively help you save time, reduce operational costs, and provide the dedicated support you need to confidently grow your business and deliver an outstanding service to your clients.





LET'S GET STARTED

Contact us :



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shartruwealth.com.au



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