



AFTER MORE THAN 30 YEARS OF partnering with advisers, we know what it takes to run a professional and profitable practice, and we understand that every practice is unique. Today we work with more than 300 advisers across the country, delivering the leadership, infrastructure, and support they need to deliver the highest quality advice to their clients, while reaching their own business targets – to prosper professionally.



HELEN BLACKFORD
CHIEF EXECUTIVE OFFICER

Our philosophy

Millennium3 (M3) believes in the positive transformative power of great financial advice. Our vision is to be the chosen business partner for great financial advice businesses and in doing so, be relevant to advisers, their clients and our broader business network.

M3 has strong ties to the insurance market and a track record of successful relationships across general insurance, accountancy and other professional partnerships. Through these relationships M3 has become a full advice business with a leading specialist risk capability, offering advisers the leadership, licensing, infrastructure, practice development support and the right connections to succeed.

A member of the IOOF Group

We are backed by the strength, stability and impressive resources of IOOF and have capabilities to support advisers to provide quality financial advice both as a financial planner or risk specialist. IOOF is an advice-led business that has been helping Australians since 1846. Importantly, as financial advice becomes more heavily regulated and costly to deliver, being part of the IOOF Group also delivers the economies of scale that will be imperative for you to continue to deliver quality financial advice.

What we stand for

We understand that no one knows your business like you do, so we encourage you to create and nurture your own brand and provide a comprehensive framework to help you deliver your services effectively and efficiently.

Leadership

Advice

Community

HOW WE DO THINGS / OUR APPROACH

- **Sustainable Practice Growth**
 - Marketing
 - Business planning support
- **Efficiency & Productivity**
 - Wealth projector
 - In-field Xplan specialists
 - Harnessing technology to power growth and efficiency
- **Safety**
 - Management of risks and change
 - Meeting education requirements
 - Legislative & regulator obligations
- **Culture**
 - Advisory board
 - Conferences
 - Month of Professional Development days

Sustainable Practice Growth –

How we help you grow your practice

We give you a clear pathway to the future with the support you need to make strategic decisions and the backing to realise your practice development goals.

- Practice Development Support
- Networks of Influence
- Next Generation Marketing Tools
- Migration Assistance
- Business Planning Support

Efficiency and Productivity –

How we help you deliver great advice

We equip our advisers with the tools, insights and professional development opportunities they need in order to remain compliant and provide superior client service.

- Comprehensive core business services
- Research
- Technical Services
- Systems and Technology
- In-Field XPLAN specialists
- Insurance Medical Service called M3 Lifewise

Safety – How we help keep you safe

With everything that's going on in the financial advisory profession, it's never been more important, nor more challenging, to keep advisers safe. That's why we've invested on three fronts- technology, people and culture – to make it easier and more cost-effective for Millennium3 advisers to deliver quality, compliant advice to their clients.

- Safety first culture
- Legislative and regulator obligations
- 360 quality and compliance support
- Management of risks and change
- Meeting education requirements
- Professional development days
- Targeted programs
- Specialist workshops

The M3 Community –

How we thrive together

Millennium3 is a close community of like-minded professionals, all focused on providing the highest quality advice and building sustainable and successful businesses.

- Select Group of Professional Practices
- Advisory Board
- National Conference

Grow with us

If you value leadership, advice and community like we do, and would like to partner with a business that understands what it takes to deliver great financial advice get in touch with us now.

To give you an advisers' perspective on Millennium3 we're happy to put you in touch with our adviser community so you can speak with them directly.

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Millennium3 Financial Services Pty Ltd
ABN 61 094 529 987 AFSL No. 244252
Telephone: 1300 129 450
www.Millennium3.com.au

