

MOVING FINANCIAL PLANNING BUSINESSES FORWARD

Specialised banking, resources and insights for your financial planning business.

more
than
money



Specialist bankers who have industry knowledge to help your business grow



Specialist bankers with industry expertise, right across metro and regional Australia



Innovative funding solutions to help your business grow



Flexible structuring to support every stage of your business



Access to Australia's largest business lender¹

Financial solutions for financial planning businesses

Our market-leading financial planning lending policy is designed to recognise the value in your business so you can make the most of your assets.

- Business lending solutions: including acquisition funding, working capital facilities, equipment finance and succession planning.
- Transactional and payment solutions that can be integrated with your accounting software packages to make reconciliation easier.
- Personal banking solutions: aligned home lending bankers to meet all your personal needs including home and investment loans, credit cards and transactional accounts.



We're here to help

If you'd like to talk about how we can help your financial planning business grow, visit us at nab.com.au/fpbanking

¹ NAB is Australia's Largest Business Lender according to Monthly Banking Statistics lending data (non-financial corporations) published by the Australian Prudential Regulation Authority as at March 2021.



High-level lending parameters²

- Minimum two qualified advisers
- Minimum \$500K Annual Recurring Revenue (ARR)
- Maximum 1.75 times Annual Recurring Revenue (ARR) and maximum 3.5x Earnings Before Interest and Taxes After Partner Remuneration (EBITAPR)
- Minimum 2.5x Interest Cover Ratio (ICR)
- Authorised representative of a NAB-accredited dealer group or self-licensed (subject to approval)

² Subject to change. Lending criteria and terms and conditions apply (available on application).

Industry research and insights



We offer unrivalled insights into industry performance, trends, valuations, the economy and the market.

- We provide transaction banking insights to help you maximise your operational efficiency and cash management.
- NAB Group Economics reports with insights into business conditions and business confidence.
- Dedicated site with industry research, analysis and insights tailored to financial planning firms and other professional services.

Visit **NAB Business Research & Insights** to find out more.

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