



Pro Bono Financial
Advice Network

This is why we do what we do

The dedicated advisers who are part of our Pro Bono Financial Advice Network (PFAN) make a real and life-changing difference to individuals living with a personal health crisis. PFAN recently interviewed Behram Ali, Financial Adviser and Senior Paraplanner at Curo Financial Services Pty Ltd, to hear about why he supports PFAN and how he is helping change lives.

Why are you involved with PFAN?

Being part of the PFAN network gives our business the chance to give back to the community and allows us to help the most vulnerable members of our society when they need it the most. Being able to help and obtain great outcomes for individuals who feel like they may have their backs against the ropes is the most rewarding experience.

Tell us about a recent client case

Our client needed help with a disability insurance claim. She had tried to contact a lawyer to do it for her but needed someone who had expertise and knowledge around insurance, but more importantly, insurance claims. During our first call, I got a good understanding of how far along her condition was and her eligibility for a TPD claim. On our client's behalf, I spoke to her super fund and insurer to obtain the relevant forms. Naturally, these claim forms are extensive and can be incredibly overwhelming for those with no prior exposure or experience. We endeavour to make the claims process as easy and stress-free as possible and so we facilitated in completing her side of the claim forms from start to finish. All she needed to do was to obtain the relevant doctor and specialist forms and we lodged the claim. After submitting the completed forms, we were able to have her TPD claim finalised in just two weeks due to our expertise and our relationships with the insurers.

Our client was so grateful for our help with her claim. MS is such a slow burn, and you know it's never getting any better. But every time I spoke with our client, she was excited to hear from me. I've never met someone so optimistic despite the circumstances they are in. There are so many people like our client who need help but don't have access to good advice and professional assistance. Just because of pure circumstances, they shouldn't be left in the dark. It's as simple as that. That's why we do pro bono. For me it was even more impactful knowing our client's background. She has worked with the Royal Fire Service for her entire life, fighting fires on the front lines, helping people and communities during their time of need. It was time for us to give back, and for people like our client, pro bono advice is a chance for us as an adviser profession to give back too.

Would you recommend pro bono advice to advisers?

Yes absolutely. You can clearly see how what you do is making a difference to the lives of people who need help but don't know where to go. We have a fiduciary duty to help those in need who don't have the necessary means to get help under normal circumstances. It is an incredibly rewarding experience to not only obtain these great outcomes for these clients, but to know you are actively giving back to the community.

Want to learn more about PFAN?

All the information you need can be found on our website: probonoadvice.com.au, or hop onto LinkedIn (search for Pro Bono Financial Advice Network) and join the PFAN community.

