

Chapter insight

CASE STUDY

PFAN expands to help more Australians in need

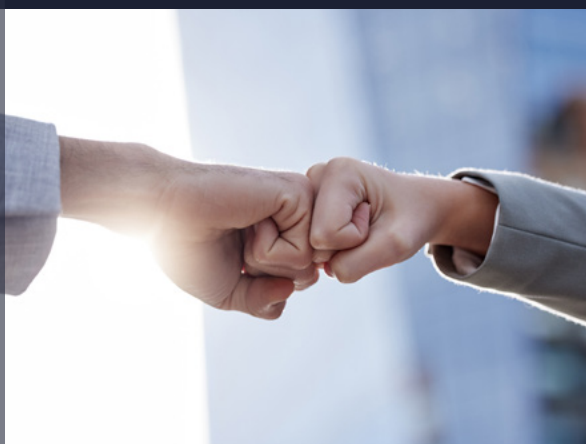
Established in 2014, Pro Bono Financial Advice Network (PFAN) is a network of financial advisers who provide pro bono financial advice to those living with a personal health condition and going through financial hardship.





Life insurers have a ringside seat around the value of advice and life insurance, especially at claim time. It is apt that the narrative of the role insurers play in Australians' lives is a precursor to the insight of the amazing work this network of advisers plays in elevating the advice profession.

PFAN recently announced two new partnerships, further expanding its existing collaborations enabling more Australians living with a personal health crisis to access pro bono advice.

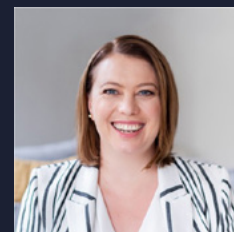


Pancare and MND Victoria have joined the network, extending its support to people affected by pancreatic and upper GI cancers and those diagnosed with motor neurone disease.

Since inception, PFAN has been working with the Multiple Sclerosis network throughout Australia, connecting individuals through referral partners to locally based advisers.

PFAN Chair Nicola Beswick said the opportunity to connect more individuals living with a personal health crisis with local based advisers is central to the organisation's mission.

"Helping to improve the financial wellbeing of Australians living with a serious illness or disability is the reason behind PFAN's inception. So being able to extend the network of charities we work with means we can help more people in need with access to financial advice."



"We can only achieve this milestone due to the generosity financial advisers throughout Australia have provided to PFAN, and the ongoing support from our corporate sponsors HUB24, Innova, Milford and supporters TAL, Zurich Assure, InterPrac, FAAA, SMSF Association, Professional Planner and Adviser Ratings."





The true impact of pro bono work: An adviser's perspective

PFAN recently interviewed Behram Ali, Financial Adviser and Senior Paraplanner at Curo Financial Services, to learn about his motivations for supporting PFAN and how his efforts are making a tangible difference.



“ 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.





How to make a difference by joining PFAN

Advisers registered with PFAN can take on one pro bono client per year, using their expertise to provide essential financial guidance and advice to individuals living with serious illnesses and facing financial hardship.



By joining the PFAN network, you become part of a community of advisers dedicated to making a real difference in people's lives through their financial planning expertise.

[Join PFAN or learn more](#)



...and discover how you can positively impact lives.

“ Having seen first-hand the impact these conditions have on the lives they effect, and the remarkable work the associated charities do for them, I wanted to give back and help out as best I could which is in the area of financial planning.

Bruno Dimasi

Senior Financial Planner, My Wealth Strategy



“ I want people to be able to get advice and improve their financial circumstances. I want to help people improve their quality of life for themselves and their family.

Kym Coleman

Adviser, Tempus Wealth



“ As a founder of a not-for-profit myself, I am keen to make a difference in my local community where possible. So, it was an easy decision to join the PFAN community to offer my financial planning services to those who are in need.

Warren Strybosch

Founder and MD, Find Wealth

