

Claiming Your Free Adviser Ratings Profile



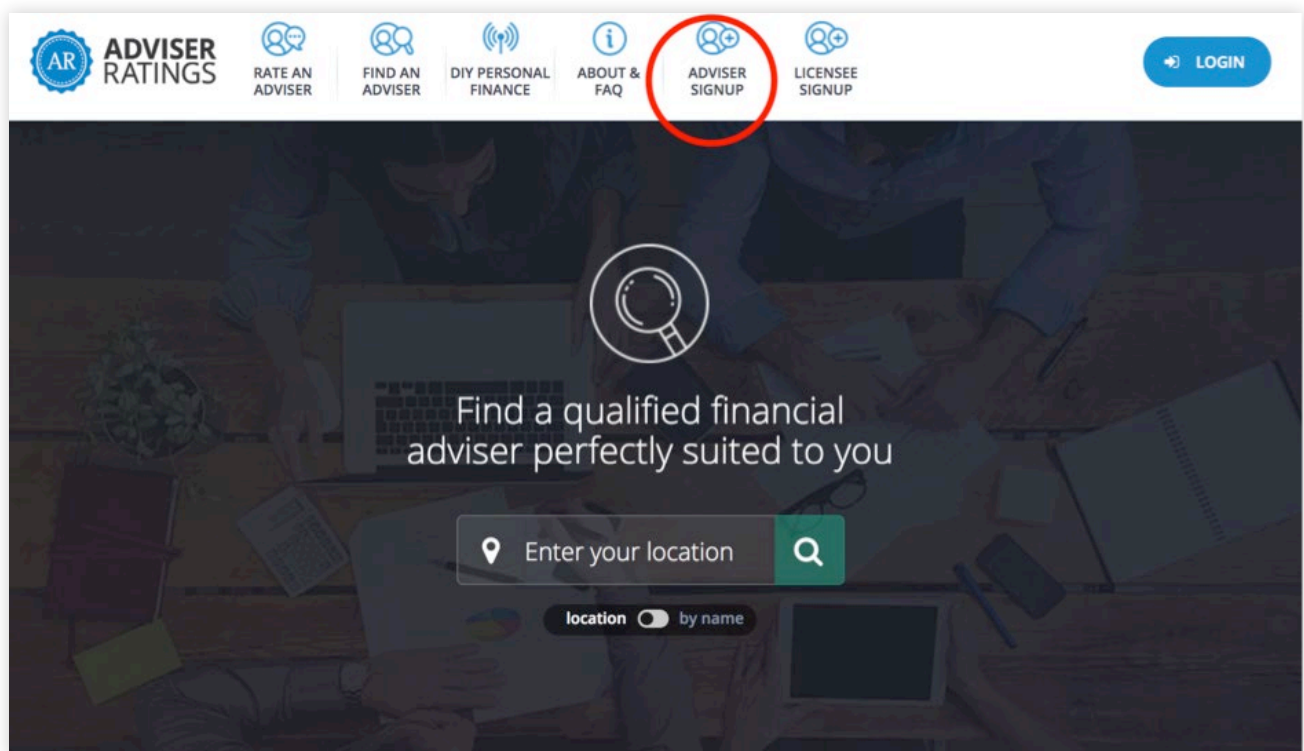
ADVISERRATINGS

Claiming Your Free Adviser Ratings Profile

To “claim” your Adviser Ratings profile and start using the free benefits it has to offer, please follow these simple steps.

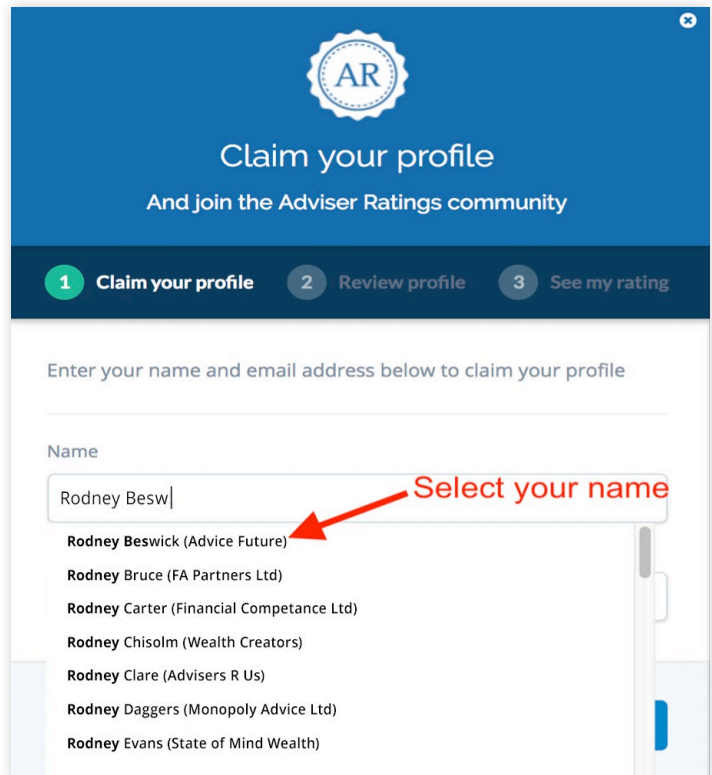
1. Go to the home page

at www.adviserratings.com.au and click on the “Adviser Signup” tab.



2. Enter and select your name

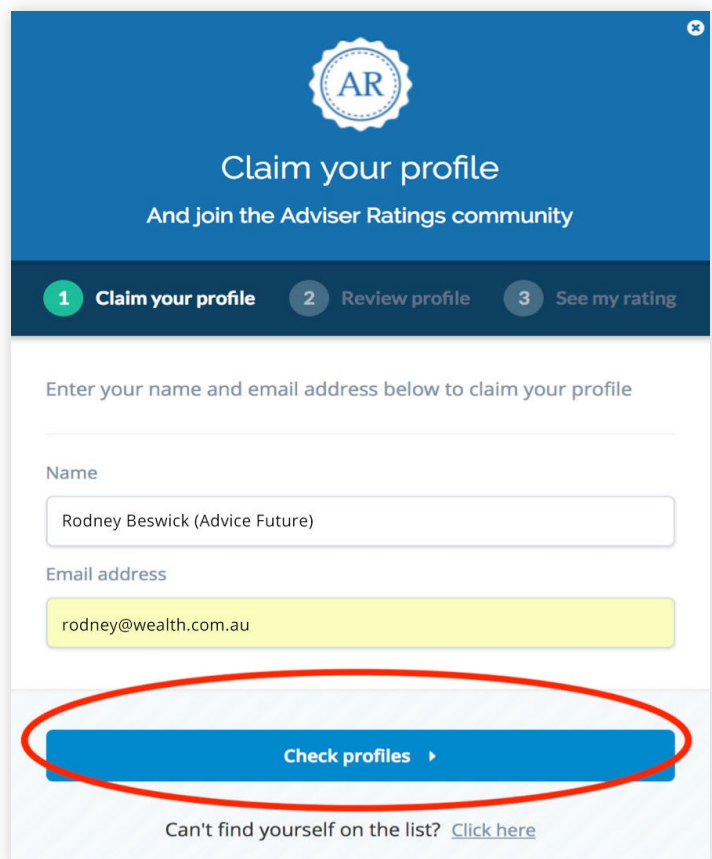
Type your Name (As it appears in the ASIC Financial Advisers Register) into the name field that appears. Your name should appear in a drop down list – select yourself from the dropdown menu)



The screenshot shows the 'Claim your profile' form with the title 'Claim your profile' and subtitle 'And join the Adviser Ratings community'. A progress bar at the top indicates three steps: 1. Claim your profile (active), 2. Review profile, and 3. See my rating. The form instructs the user to 'Enter your name and email address below to claim your profile'. Under the 'Name' label, a text input field contains 'Rodney Besw'. A red arrow points from the text 'Select your name' to the dropdown list below the input field. The dropdown list contains the following options: Rodney Beswick (Advice Future), Rodney Bruce (FA Partners Ltd), Rodney Carter (Financial Competance Ltd), Rodney Chisolm (Wealth Creators), Rodney Clare (Advisers R Us), Rodney Daggers (Monopoly Advice Ltd), and Rodney Evans (State of Mind Wealth).

3. Enter your email address

Then click "Check Profiles"



The screenshot shows the 'Claim your profile' form with the title 'Claim your profile' and subtitle 'And join the Adviser Ratings community'. A progress bar at the top indicates three steps: 1. Claim your profile (active), 2. Review profile, and 3. See my rating. The form instructs the user to 'Enter your name and email address below to claim your profile'. Under the 'Name' label, the text input field now contains 'Rodney Beswick (Advice Future)'. Under the 'Email address' label, the text input field contains 'rodney@wealth.com.au'. A red oval highlights the 'Check profiles' button at the bottom of the form. Below the button, there is a link: 'Can't find yourself on the list? [Click here](#)'.

4. Review your profile

Then click on “See my preliminary rating”

Claim your profile
And join the Adviser Ratings community

1 Claim your profile 2 **Review profile** 3 See my rating

Here is the profile information we have gathered from the ASIC register. You'll be able to update information in your dashboard.

Licensee/dealer group:

Advice Future

Company name (optional)

Wealth

My Qualifications

No qualification found

My Memberships

No membership found

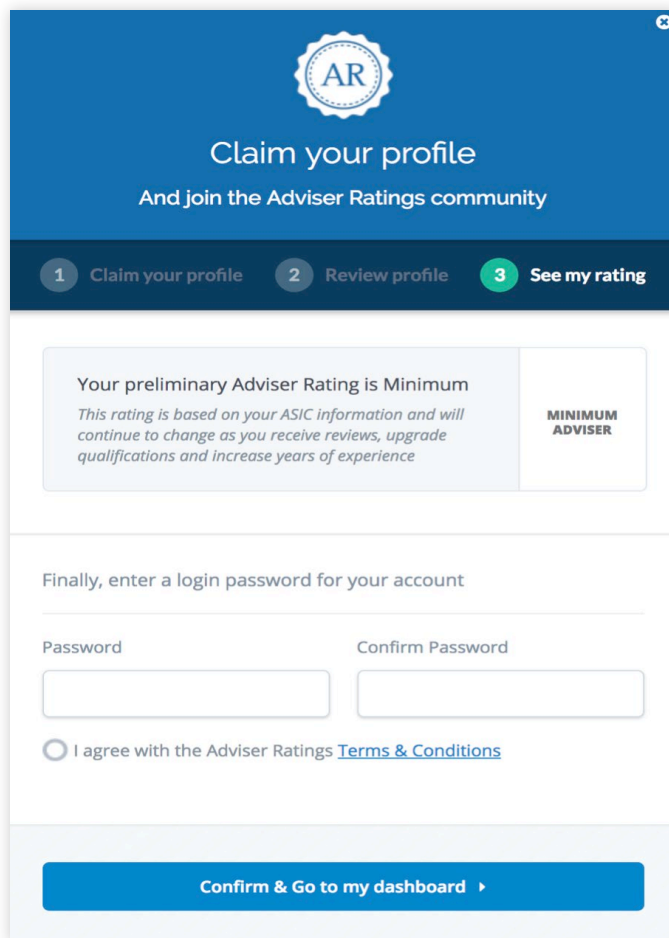
Note: Your details are directly taken from the ASIC register. If you feel that any of these details have been incorrectly transposed from ASIC, please contact admin@adviserratings.com.au

See my preliminary rating

After reviewing your details, click here

5. Create your password

Simply create and confirm your password, tick the terms and conditions checkbox then confirm and go to your Adviser dashboard. Congratulations – you have now claimed your profile.



The screenshot shows the 'Claim your profile' page. At the top, there is a blue header with the 'AR' logo and the text 'Claim your profile' and 'And join the Adviser Ratings community'. Below the header is a progress bar with three steps: 1. Claim your profile, 2. Review profile, and 3. See my rating. The third step is highlighted in green. Below the progress bar, there is a box stating 'Your preliminary Adviser Rating is Minimum' with a note that the rating is based on ASIC information and will change as you receive reviews, upgrade qualifications, and increase years of experience. To the right of this box is a badge that says 'MINIMUM ADVISER'. Below this, there is a section titled 'Finally, enter a login password for your account' with two input fields for 'Password' and 'Confirm Password'. Below the input fields is a checkbox labeled 'I agree with the Adviser Ratings' followed by a link to 'Terms & Conditions'. At the bottom of the form is a blue button labeled 'Confirm & Go to my dashboard' with a right-pointing arrow.

You will receive an automatic confirmation email shortly after claiming your profile with some tips to start filling out your profile. For newly claimed advisers, you will also receive a 30-day free trial of the “premium” features of the site. Once your 30-day trial is complete, you will automatically revert to our free “basic” profile with absolutely no obligation to pay.

Some information on your profile is pre-populated, for example, your qualification and membership information is imported from the ASIC Financial Advisers Register (FAR), but you can amend details such as your company name and logo. Don’t forget to check your address details (no P.O Boxes please!) to ensure you appear in the correct suburb in our postcode search!

If you have any issues, questions or queries, please do not hesitate to contact our customer service team at admin@adviserratings.com.au

Enhancing Your Adviser Ratings Profile



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Enhancing Your Adviser Ratings Profile

Once you have claimed your profile there are a number of steps you can take to enhance its appearance and effectiveness.

1. Upload your photo and confirm contact details

Upload a web quality profile picture - to make your profile stand out.

1. Login to your Adviser Ratings profile;
2. Click on your "My Profile" tab at the top of your profile (then the "Overview" sub-tab);
3. Make sure your image is less than 3mb in size
4. Whilst you are there, edit your company name and upload/update your logo (if needed).

Edit your location and contact details - to ensure your profile appears when a potential client is looking for an adviser in your location.

1. In the "Location & Contact Details" sub-tab;
2. If needed – update your contact details, in particular your address - Please no PO Box addresses as this may adversely affect the search function and your location map.

Edit your skills list.

1. In the "My Skills List" sub-tab;
2. Select all the "skills" that you are competent in so that a potential client can see your service offering.
3. Finish recording your skills by clicking save and update. (You may amend these at any time).

Once these basics have been attended to, you are ready to get reviews!

1. Upload your photo and confirm contact details

The screenshot shows the 'Sam Test Adviser Ratings' profile page. The top navigation bar includes links for Account settings, Logout, Dashboard, My Profile (circled in red), My Clients, Resources, and Stats & reports. The left sidebar contains a list of menu items: Overview (circled in red), My Videos, My Skills List (circled in red), History & Qualifications, Fees, Location & Contact Details (circled in red), My Customer Reviews, Vouch for & Skills Ranking, Bitly, Customer Messages, and Questionnaires & Surveys. A red arrow labeled 'Edit Profile Pic' points to the profile picture placeholder, which has a 'Change photo' button. Another red arrow labeled 'Edit Company Name/Logo' points to the 'Edit' button at the bottom of the company information section. The main content area shows the 'Overview' tab with a 'VIEW PROFILE' button. It displays a summary of the profile: TOTAL REVIEWS (0), EXPERIENCE (9 yrs), STATUS (Gold), OVERALL ADVISER RATING (80%), AVERAGE CUSTOMER RATING (0%), and PERCENTAGE OF POSITIVE REVIEWS (0%). Below this is an 'Introduction' section with a red banner stating 'This premium feature is locked and is hidden from public view. Upgrade'. The introduction text area contains 'Intro Text (Premium Feature)' and a word count of 4. At the bottom, there are three columns for 'Company:', 'Licensee:', and 'Licensee Owned By:', each with a logo placeholder and the name 'Sam LLC', 'Sam Pty Ltd', and 'Sam Pty Ltd' respectively. An 'Edit' button is located at the bottom right of the company information section.

Sam Test Adviser Ratings

Account settings | Logout

Dashboard My Profile My Clients Resources Stats & reports

Overview

VIEW PROFILE

My Skills List

History & Qualifications

Fees

Location & Contact Details

My Customer Reviews

Vouch for & Skills Ranking

Bitly

Customer Messages

Questionnaires & Surveys

Change photo

EDIT PROFILE PIC

Introduction

This premium feature is locked and is hidden from public view. Upgrade

Intro Text (Premium Feature)

Words: 4

Save & update

Company: Licensee: Licensee Owned By:

Sam LLC Sam Pty Ltd Sam Pty Ltd

EDIT COMPANY NAME/LOGO

Edit

2. Get reviewed by your customers

Now you are ready to get reviewed by your clients, instructions on how to invite your clients to rate you and leave a testimonial are provided here:

<https://www.adviserratings.com.au/news/online-reviews-matter-to-your-business/>

You'll be able to customise and preview your email request before it is sent to your clients by the Adviser Ratings platform.

The screenshot shows an email template from Adviser Ratings. The header includes the Adviser Ratings logo and social media icons. The main content area has a blue header with a 'You're invited' envelope icon. Below this, the text reads: 'Hi there', 'As a valued client, your adviser Rodney Lester from Brightscope has just invited you to rate their performance on Adviser Ratings. Your rating helps advisers show their competence and helps other potential customers choose an adviser right for them.' This text is annotated with a red arrow pointing to it from the text 'Templated copy (adviser name changes)'. Below the text is a profile card for Rodney Lester, Brightscope, with a 'See Profile' link. Below the profile card is a blue box containing the text: 'From Rodney: "Hi Guys, I like this initiative from Adviser Ratings - Please rate me!!"'. This box is annotated with a red arrow pointing to it from the text 'Your custom message'. Below the blue box is a blue button that says 'Add your rating now (takes approximately 2 minutes)'. This button is annotated with a red arrow pointing to it from the text 'This button takes client directly to advisers own rating page, bypassing the need to look them up on site (limiting failed searches due to spelling errors etc)'. At the bottom of the email, there is a thumbs up icon and the text: 'Thanks for supporting the Adviser Ratings community. We believe customer ratings, like yours, help to add transparency to the financial advice industry and build better consumer confidence.' The footer includes social media icons for Facebook, Twitter, and LinkedIn, and the copyright notice: '© 2017 Adviser Ratings Pty Ltd • [adviserratings.com.au](https://www.adviserratings.com.au)'.

Close

ADVISERRATINGS

You're invited

Hi there

As a valued client, your adviser Rodney Lester from Brightscope has just invited you to rate their performance on Adviser Ratings. Your rating helps advisers show their competence and helps other potential customers choose an adviser right for them.

Rodney Lester

Brightscope

See Profile

Cust Rating N/A Reviews 0

From Rodney: "Hi Guys, I like this initiative from Adviser Ratings - Please rate me!!"

Add your rating now (takes approximately 2 minutes)

Thanks for supporting the Adviser Ratings community.

We believe customer ratings, like yours, help to add transparency to the financial advice industry and build better consumer confidence.

Facebook Twitter LinkedIn

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Templated copy (adviser name changes)

Your custom message

This button takes client directly to advisers own rating page, bypassing the need to look them up on site (limiting failed searches due to spelling errors etc)

3. Use tools to further promote your Adviser Ratings profile

A great way to promote your Adviser Ratings profile is using our free tools available in your profile.

Your profile has free “buttons and badges” enabling you to further promote your profile. There are various sizes to choose from with selected messages or Calls To Action (CTA) like “Find me on Adviser Ratings” or “Adviser Ratings Gold Adviser”. The only thing you have to do is place them where you want on your website and/or your email signature.

They are dynamic (clickable) and “set and forget”. Once added to your website or email signature a consumer may click on them and they will be taken to your profile with no extra work on your part.

The value of utilising these buttons/badges is two-fold:

- Firstly, they fulfil the valuable function of disseminating information about yourself to the individual who is actually viewing the material.
- Secondly – and arguably more importantly, these features provide one touch connections to your Adviser Ratings profile on the internet. Each time these functions are used it increases the “strength of connection” between your site and your profile on Adviser Ratings. This ultimately feeds into search engine algorithms and will increase your visibility on search engines such as Google.

Add Adviser Ratings badge to email signature and/or website

1. Login to your Adviser Ratings profile;
2. Click on your “Resources” tab at the top of your profile (then the “Tools to Promote My Profile” sub-tab);
3. Select your “button” from the drop down menu and click view
4. To embed onto your website, copy the HTML code provided and insert into your to your website code where desired.

(To use a button in your email signature – you may simply copy and paste the button, and place it there)

Don’t forget, you currently have access to many other free “Basic” profile features (and free access to “Premium” paid features for one month to trial) so have a look around and check out the functionality of your profile. If you have any questions or queries, feel free to email us at admin@adviserratings.com.au

3. Add Adviser Ratings badge to email signature and/or website

The screenshot shows the Adviser Ratings dashboard for a user named Sam Test. The top navigation bar includes links for Account settings, Logout, Dashboard, My Profile, My Clients, Resources (highlighted with a red circle), and Stats & reports. The left sidebar contains links for Exclusive Offers, Learn & Up-Skill, Commitment to Ethics, Review Widget, Tools to Promote My Profile (highlighted with a red circle), and Messages from My Licensee. The main content area is titled 'Profile promotion tools' and features a dropdown menu for selecting badge sizes. The dropdown menu is open, showing a list of options: Banner 150x150px, Banner 160x40px, Banner 200x200px, Banner 234x50px, Banner 250x250px, Banner 468x50px, Find Me 150x150px, Find Me 160x40px, Find Me 200x200px, Find Me 234x50px, Find Me 250x250px (selected), and Find Me 468x50px. Below the dropdown menu, there is a section titled 'Find Me 250x250' with a description: 'You can download the images for use on email footers, social media etc. The images can then be uploaded from your computer.' This section includes an example of the badge, which is a blue square with the text 'Find me on' and the Adviser Ratings logo and website address 'adviserratings.com.au'. A red arrow points to the example badge with the label 'Example of Badge'. Below the example badge is a 'Download' button. At the bottom, there is an 'Embed code' section with instructions: 'To embed onto your website, copy and paste the below HTML code to your site.'

Select which size Button/Badge you would like to use

Profile promotion tools

Select

- Banner 150x150px
- Banner 160x40px
- Banner 200x200px
- Banner 234x50px
- Banner 250x250px
- Banner 468x50px
- Find Me 150x150px
- Find Me 160x40px
- Find Me 200x200px
- Find Me 234x50px
- Find Me 250x250px
- Find Me 468x50px

Find Me 250x250

You can download the images for use on email footers, social media etc. The images can then be uploaded from your computer.

Find me on

ADVISER RATINGS

adviserratings.com.au

Download

Embed code

To embed onto your website, copy and paste the below HTML code to your site.