

BROKER PROFILE



Angelo Benedetti

Company: Oracle Lending Solutions

Current role: Director

Years in broking: Nine

Where has the majority of your business come from over the past six months?

Investors – most of my clients are property investors (both residential and commercial).

What was the highest selling product over the past six months?

Professional packages and five-year fixed rates on large commercial loans.

Where do you intend to increase business over the next 12 months?

Leasing and commercial. At present this represents 30% of our business. We are looking to increase this to 50% in the next 12 months.

What is the most effective form of advertising for your business?

Word of mouth. All of our work is from existing clients and professionals.

The majority of my referrals come via:

Existing clients and accountants.

No. of loans settled per month/year:

30 per month and 300 per year.

Record month: 48.

Average month: 30.

Average loan amount: \$400 000.

Short-term goal:

Finalise my strategic alliances with certain professional firms.

Twelve-month plan:

Reduce the number of hours in my working week to 35 and ensure I have six weeks of holidays every year.

Preferred lender and reason:

No preferred lender. I will analyse each lender and recommend the one that best suits my clients and objectives. I regularly use a very large panel of lenders.

Biggest career challenge and how was this overcome?

Juggling a financial planning practice and finance broking firm. Overcome by introducing a business partner in the financial planning practice and now I concentrate on the finance broking.

Every broker needs...

A brilliant PA and a supportive family.

In my spare time, I like to...

Spend time with the family, play sport and travel. ■