Resources
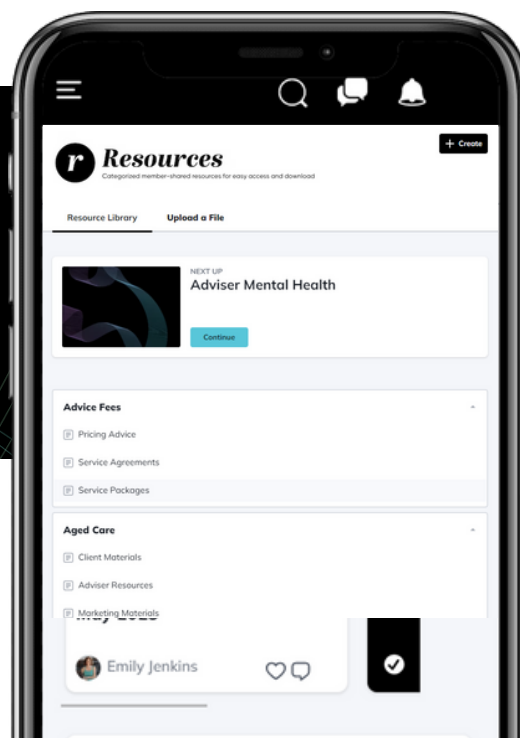
Categorised advisor-shared resources and documents for easy access and download.
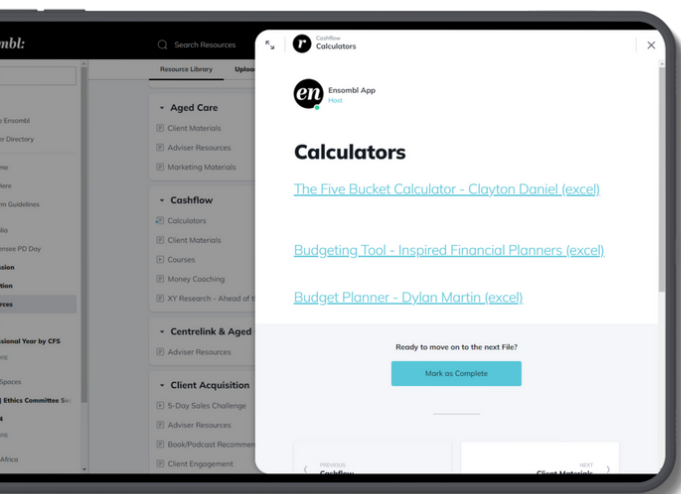
What is it?

In the 'Resources' space of the platform, you'll find a treasure trove of templates, calculators, documents, marketing materials, presentations and more - all categorised into 'Topics' across the advice process.

How to find what you're looking for

Click on 'Resources' on the left navigation menu. You'll see the Resource Library, where all files are categorised under various advice topics, and in alphabetical order.

Within each category, you'll see sub-categories you can click into and view all files relating to that category.

For example, if you wanted to see how others' have built their insurance needs calculator - scroll down to Insurance, then click the sub-heading 'Insurance Needs Calculators'. Currently, you'll find four advisor-shared calculators you can download, tweak and use in your own practice.

How to add a file to the Resource Library

To add to the growing library of resources and add your own for others to benefit from, click the 'Upload a File' tab at the top navigation menu inside the Resources space.

From there, click to create a new post, enter a short description about the document and click the file icon to upload your resource. Then click post.

The Ensombl community team will then get to work adding your file in the right category in the Resource Library.

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