

MERIT WEALTH

BASIC DEPOSIT PRODUCTS ASSESSMENT





Basic Deposit Products Assessment

Name: _____

Firm: _____

Date: _____

1. Cash Management Accounts generally carry a higher interest rate than transaction accounts?

True

False

2. Macquarie CMA feeds into Class and BGL super admin systems?

True

False

3. What is the bonus rate clients with a Macquarie CMA and a Financial Adviser receive?

0.10%

0.20%

0.25%

0.50%

4. Merit Wealth's Basic Deposit Product authorisation allows advice on Pooled Mortgage Funds?

True

False

5. Which of the following is not a Basic Deposit Product?

Term Deposit

Savings Account

Fixed Interest Managed Fund

Cash Managed Account

Please email your completed assessment to BDP@meritwealth.com.au