oreana.partnerships

Oreana Financial Services Pty Ltd
ABN 91 607 515 122
AFSL 482234

Oreana Partnerships & Key Partners Contact Information

Oreana Licensee Information

All information relating to Oreana's Advice collateral, Licensee guidelines & policies can be found in the Oreana Adviser Portal Home Landing Page – Oreana Advisor Portal

To request access to the adviser portal, please complete the Update Practice Staff for the Licensee's records (not for advisers)

For any questions relating to access please contact
advisersupport@oreanapartnerships.com.au

Phone Us

Oreana: (02) 7238 4192

When you call, you'll be presented with the following options:

- Press 1 – Xplan Support
- Press 2 – General Enquiries or Operations Support
- Press 3 – Advice, Advice Process, or Compliance Queries
- Press 4 – Report a Cyber Incident

(Note: You can still reach us on our mobiles – this line is optional.)

You can also leave us a voicemail if you reach us out of hours and we will get back to you.

Team Contacts

Name	Position	Mobile	Email
Jonathan Christie	General Manager	0413 085 386	jonathan.christie@oreanapartnerships.com.au
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Alyssa Doherty	Head of Operations & Transitions	0410 620 172	alyssa.doherty@oreanapartnerships.com.au
Sally Bridgland	Head of Enablement & Change	0448 073 398	sally.bridgland@oreanapartnerships.com.au
Amy Vamvoukis	Advice Associate	0428 567 330	amy.vamvoukis@oreanapartnerships.com.au
Mark Tiller	Advice Technology	(02) 7238 4192	techsupport@oreanapartnerships.com.au
Sandra Bernardo	Quality Advice Manager	0416 434 584	sandra.bernardo@oreanapartnerships.com.au
Operational Support	Operations Associate	(02) 7238 4192	advisersupport@oreanapartnerships.com.au

Partner Contacts

Entity	Department	Contact Information	Details
Oreana Partnerships	Operations Enquiries	T: (02) 7238 4192 adviersupport@oreanapartnerships.com.au	Adviser administration, Oreana systems access, revenue and brokerage queries, education requirements and professional year matters
Xplan Support - Oreana	Xplan Helpdesk	techsupport@oreanapartnerships.com.au Portal: Oreana Xplan Support – Oreana Advisor Portal	Xplan helpdesk requirements
Brokerage - Opex	Brokerage	support@opexconsulting.com.au (You must place ATT BROKERAGE at start of the subject line)	Revenue Payments and Processing
Oreana Partnerships	Compliance	sandra.bernardo@oreanapartnerships.com.au	Dedicated contact for compliance queries
Kaplan	CPD tracking and reporting	adviersupport@oreanapartnerships.com.au or tpc@kaplan.com.au T: 1300 135 798 (option 2)	Ontrack system, email and phone support, continuing education and study
Lonsec – Research	iRate Enquiries	T: 1300 826 395 support@lonsec.com.au	Research ratings
Morningstar – Research	Morningstar Help Desk	T: 1800 348 628 helpdesk.au@morningstar.com	Research ratings

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