

InterPrac Financial Planning Women's Peer Group

Agenda

Thursday 9th May 2019



9.45 am

Arrival

10.00 am Getting to know each other

Working in a small business can feel quite isolated at times and sometimes all you need is a different view point or someone to discuss an idea, therefore getting to know the women around you within the licensee that you can call upon when you need them will be really important.

10.30 am Business Insights

Anna Bottomley, Owner and Financial Adviser at Bottomley Financial Services and Sarah Rickruss, Financial Adviser at Murdoch Private Wealth will share with the group an overview of their business, what they are most proud of, their challenges and what they would like to achieve personally and professionally over the next twelve months.

12.00pm Thinking outside the box – tapping into Corporate Advisory and Investment Specialists

Continuously delivering value to your Sophisticated and Business clients can be quite challenging, however you have the ability to engage the skills and expertise from Michael Locaso and Mark Simari. Operating under the Sequoia licence, both Michael and Mark run highly focused Corporate Advisory and Investment firms with a hands-on approach to business. They work with only a few businesses to ensure they dedicate their time and expertise to Owners and Managers to execute their Strategic Business Plan. The Key value areas that they specialise in are:

- Expansion Planning – Preparing for New External
- Implement Corporate/Operational Structure to handle growth
- Organic Growth Strategy
- Strategic Merge and Acquisition opportunities
- Management Buyouts

12.30 pm

Lunch with Garry Crole

1.30pm Creating a business with the clients you really want to work with

When asked the question, what clients would you want to work with? 99% of people say 'the ones that pay me' and even though this may be true, the ones that pay you and on time may become the most painful clients to work with and can cause levels of stress in your business that is unnecessary. During this session, we will discuss how you are able to find the courage to fire the clients you don't wish to work with and how you find clients you actually want to work with.

2.15 pm How to attract and retain quality staff

Attracting and retaining quality staff is a common theme we all hear with most business owners. Unfortunately, there is no silver bullet that you can easily implement into your business, as people want and need so much more than an excellent salary.

Richard Branson has a wonderful quote – 'Train people well enough so they can leave, treat them well enough so they don't want to.'

During this session, we will discuss 'why' would a potential employee want to come and work for you in your business and what conversations do you need to have with them in order for them to stay.

3.00pm Guest Speaker

We have very busy professional and personal lives and as women we tend to dedicate our time to others. Well this hour is all about us and how we need to start looking after ourselves a little better. Whether this is about personal brand or mindfulness, your guest speaker for the day will focus on giving you the tools to enhance YOU!

4.00 pm

Close