Fitzpatricks
Private Wealth

YOUR *ADVICE* PARTNER

Partnering with like-minded advisers to build great client outcomes

v01/21

WHY *PARTNER* WITH FITZPATRICKS

A single focus of achieving great client outcomes

A PIONEER **IN FEE FOR SERVICE, PROJECT MANAGEMENT** STYLE OF ADVICE TO **ENRICH CLIENTS' LIVES**

ENRICH

Enrich our advisers' lives by providing culture, training and guidance to build a great business.

ORGANISE

Proven "Lead Adviser" model designed to enrich the lives of your clients to get them life sorted and financially well organised.

ENABLE

Having the support structure to enable you to run a Lead Adviser practice.

AN ADVICE BUSINESS **BUILT BY ADVISERS** FOR ADVISERS

Helping you to **connect with your clients** through a shared belief in the value of financial advice – owned and operated by financial advisers.

Project manage people's financial affairs to get them **financially well organised.**

Providing a model to **help families manage wealth and legacies,** aligning our interests with the clients.

Our fee-based approach makes for a great relationship with clients.

Helping you to manage time and provide great outcome based financial advice to your clients.

A PARTNERSHIP BASED ON **ADVICE EXCELLENCE**

01.

Your business mentor providing **strategy support**.

02.

Your **client service** and administration **professional services hub.**

03.

Your communication and **marketing support**.

HELPING YOU TO **BUILD** A **GREAT BUSINESS**

WHO WE ARE AND **WHY WE ARE DIFFERENT**

Integrated wealth management and advice business.

ENRICHING LIVES

Full licensee services through to a partnering and community model.

High-net wealth Australians, individuals, families and business owners with complex needs.

Exclusive best of breed structure, **partnering with advisory practices** by invitation only.

Providing a **fee-based approach** for advice and helping you operate on a **low client to adviser ratio**.

OUR **PEOPLE**

4

FOUNDERS & ADVICE EXECUTIVES

JOHN Woodley

SCOTT Fitzpatrick

MATT Fogarty

NICK Brinkworth

FPW has dedicated on the ground resource teams to support you in the following areas:

- Practice and adviser development
- Marketing
- Education & training
- Tools, systems and processes
- Commercial compliance

OVER

100

ADVISERS

OVER

50

COACHES & TEAM MEMBERS

WHERE WE **STAND**

OVER

100

LICENSED ADVISERS

working with FPW clients nationally

QLD

NSW

ACT

VIC

SA

WA

Over 30 years of Excellence — *2021*

Fitzpatricks Private Wealth

1987

A visionary moment by Scott Fitzpatrick. Gap identified in market for client-centric financial advice, understanding clients' needs and charging fees for advice vs. commissions on products sold.

Fitzpatricks was born.

1990-2002

Success! Following an extensive search for the most suitable licensee and investment platform to grow FPW to no avail, it led to forming Fitzpatricks Dealer Group.

2001

John Woodley joins forces with Scott to help shape a different type of advisory service – helping clients create long-term life plans and legacies.

2003

Brian Fitzpatrick EQ/business coach joins to help shape business structure for Advisers.

2004

Inception of Lead Adviser 2-day training workshop developed by Scott Fitzpatrick and Brian Fitzpatrick (no relation). A collaborative advice forum, working with the other advisers to develop hard and soft skills for advisers to provide strategic advice to high net wealth individuals and families.

2005

Hard work pays off. Approached by other quality financial planners attracted by integrity of business model, FPW evolved into a national firm by evoking a different method to financial planning and investments – minimising risk and improving the quality of clients' lives.

2007-2009

Adopted Risk Targeted Approach. FPW head office moves from Gold Coast to Brisbane.

2011

Alex Hone joins Fitzpatricks to lead the investment portfolio function for FPW.

2012

Australian wealth industry leaders, Chris Cuffe and John McMurdo, join Board of Directors to extend Group's national momentum and deepen services to high net worth investors. Three new practices join FPW partnership.

2013

FPW Martin Place, Sydney office opens.

2014

FPW appoints Brett Ireland, Chief Operating Officer, Colin Bold, Head of Marketing and Anthony Vaiente, Head of Business Growth, to support the ongoing expansion of the Group's national wealth management footprint and broaden its service offering to advisers.

2015

Rob Thomas, Manager, Advice Excellence, joins FPW to synchronise high standards of core advice philosophy and practical delivery of technical, governance and advice tools. Seven new practices join FPW partnership.
Testamentary trust service commences.
The Hub paraplanning services opens.

2016

Official licence name change to Fitzpatricks Private Wealth Pty Ltd. Three new practices join FPW partnership.

2017

Capital funding secured for national growth with Quadrant Private Equity & Yorkway Capital Partners.

2018

Matt Fogarty appointed as CEO of Fitzpatricks Private Wealth to provide more strategic vision for the company and help advisers to build a great Lead Adviser business.

2020

Jodie Blackledge assumes position of Group CEO for Fitzpatricks.

TODAY

A thriving partnership with over 60 practices and 100 advisers to date. Nationally recognised as leading client centric advice process.

OUR VISION IS CONSISTENT WITH CLIENT EXPECTATIONS

Lead Adviser

With around a quarter of Australians having received financial advice in the past but about **40%** *intending to seek it in the future,* opportunities exist for forward-thinking advisers wanting to grow sustainable businesses.*

In our experience they boil down to **5** *key areas*

PRIVATE OWNERSHIP / IMPARTIALITY
not institutionally biased

INTEGRITY AND LONG TERM RELATIONSHIPS
not short term retail banking style relationships

PROFESSIONALISM
qualifications, training, expertise

OUTCOMES (NOT EVENTS)
focused advice that enhances clients' lives

OUTCOMES FOCUSED PORTFOLIO CONSTRUCTION
systems, disciplines, track record (not interested in "our" benchmarks, want "their" outcomes)

*Reference: Consumers see value in financial advice, but lack of trust remains an issue, ASIC, 29 August 2019

WHAT ARE **SOPHISTICATED CLIENTS LOOKING FOR?**

Inspiration to the profession

A **quality board** — balance of advisory experience and company experience

Unrivalled client advocacy, **NPS +75**

Sustainable growth > top quartile

AUSTRALIA'S **LEADING PROFESSIONAL WEALTH** MANAGEMENT FIRM

A **preferred** partner of **professional advisers**

A **trusted advisory** firm model

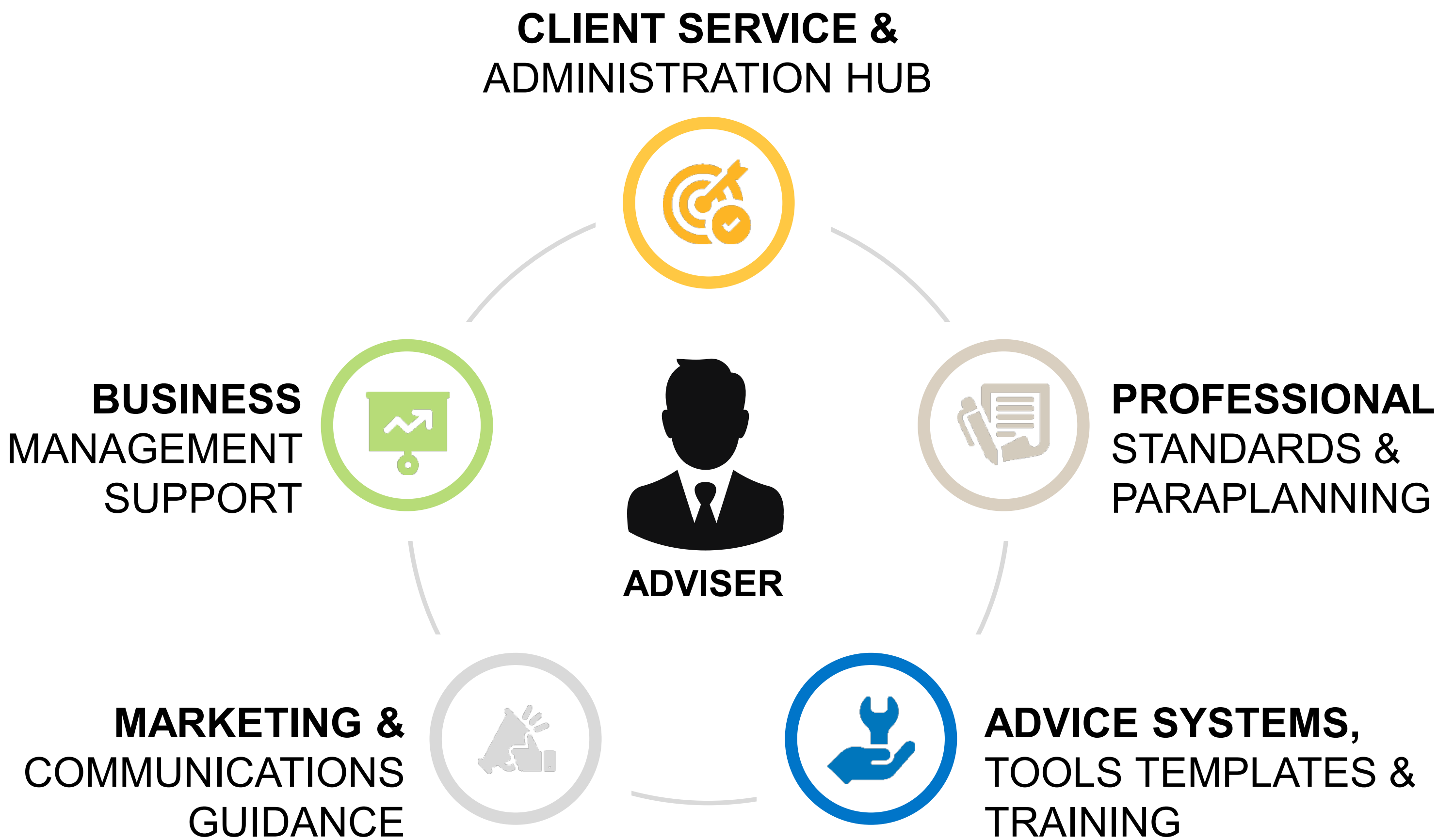
Only **highly** qualified, **ethical**, **professional** advisers

Advisory and **investment management** fees, not rebates

Underlying **passion to lead** emergence of a true **profession**

HOW WE *PARTNER* WITH YOU

ACCESS TO THE RIGHT **RESOURCES** FOR YOUR BUSINESS



OBJECTIVES OF THE **LEAD ADVISER BUSINESS** PROGRAM

1. **Develop** a clear long term **business** vision.

2. **Set** medium and short term **goals** & objectives.

3. **Identify** current position.

4. **Provide** frameworks and tools to achieve goals & objectives.

5. **Provide** coaching and accountability program along the way.

CONTACT US

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