

Lean, Mean, Revenue Machine

How 4 Advisers can grow to £4 Million Revenue and way beyond



Julian Gilbert
Founder and Director



Wealth Matters

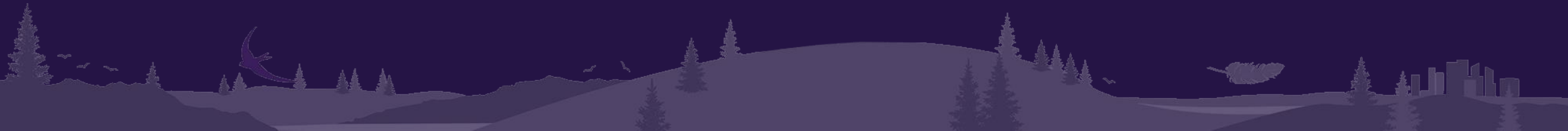
CELEBRATING 25 YEARS



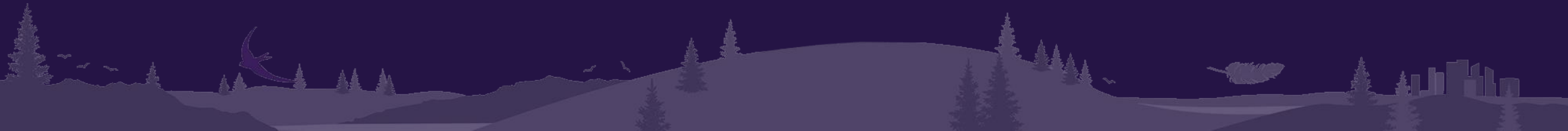
Katherine Pautard
Partner



Then & Now



Then & Now



What average and Great looks like



Industry Average

Revenue per Adviser	£200,000*
FUM per Adviser	£20,000,000*
Turnover per FTE staff	£100,000**

Sources:

*Transact Adviser survey

**Metrics used by industry experts



What average and Great looks like



Industry Average

Revenue per Adviser	£200,000*
FUM per Adviser	£20,000,000*
Turnover per FTE staff	£100,000**

Wealth Matters

2024 Turnover	£4,019,474
Number of Advisers	4
Revenue per Adviser	£1,004,869

Sources:

*Transact Adviser survey

**Metrics used by industry experts



What average and Great looks like



Industry Average

Revenue per Adviser	£200,000*
FUM per Adviser	£20,000,000*
Turnover per FTE staff	£100,000**

Wealth Matters

2024 Turnover	£4,019,474
Number of Advisers	4
Revenue per Adviser	£1,004,869
FUM	£372,000,000
FUM per Adviser	£93,000,000

Sources:

*Transact Adviser survey

**Metrics used by industry experts



What average and Great looks like



Industry Average

Revenue per Adviser	£200,000*
FUM per Adviser	£20,000,000*
Turnover per FTE staff	£100,000**

Wealth Matters

2024 Turnover	£4,019,474
Number of Advisers	4
Revenue per Adviser	£1,004,869
FUM	£372,000,000
FUM per Adviser	£93,000,000
Total FTE staff	18
Turnover per FTE	£223,000

Sources:

*Transact Adviser survey

**Metrics used by industry experts

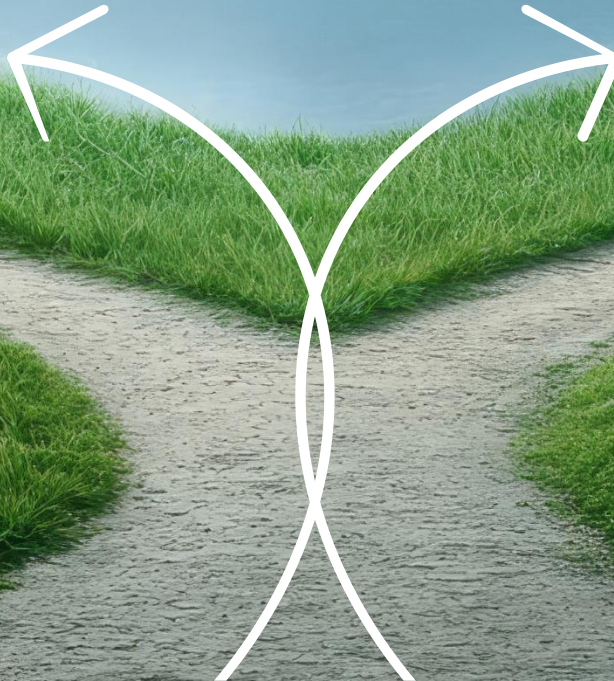


Which Business do You Want to Be?



< Lifestyle

Growth >





“You can’t beat a bit of Bully”



“You can’t beat a bit of Bully”



To achieve all client goals:
£1.8m pot needed

"You can't beat a bit of Bully"



client

✓ To achieve all client goals:
£1.8m pot needed

"You can't beat a bit of Bully"



client



To achieve all client goals:
£1.8m pot needed



A £4m business is?

"You can't beat a bit of Bully"



client

- ✓ To achieve all client goals: £1.8m pot needed
- ✓ A £4m business is?
- ✓ 500 clients all hitting their bullseyes

It's all about goals setting.

£1 Million Adviser: the Secret Recipe



£1 Million Adviser: the Secret Recipe



adviser

£1 Million Adviser: the Secret Recipe



adviser

✓ Fiduciary Duty

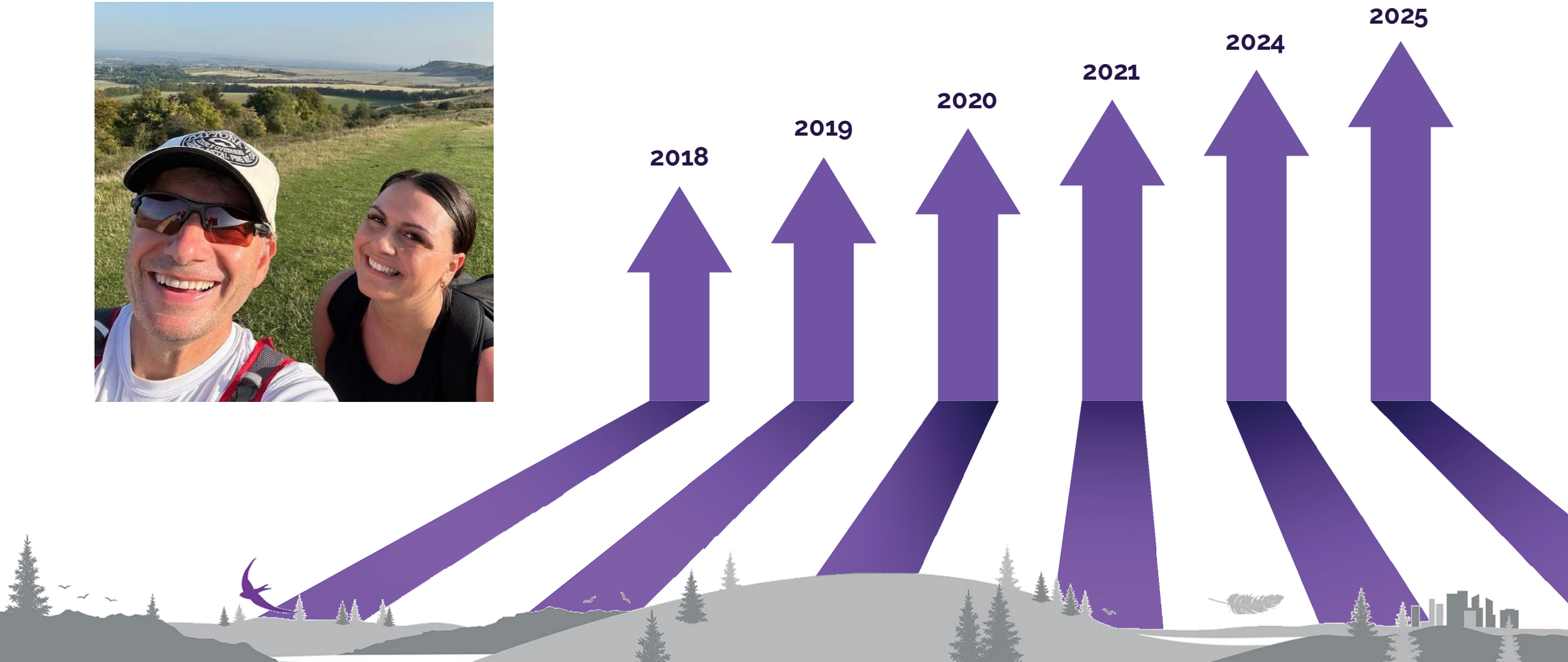
£1 Million Adviser: the Secret Recipe

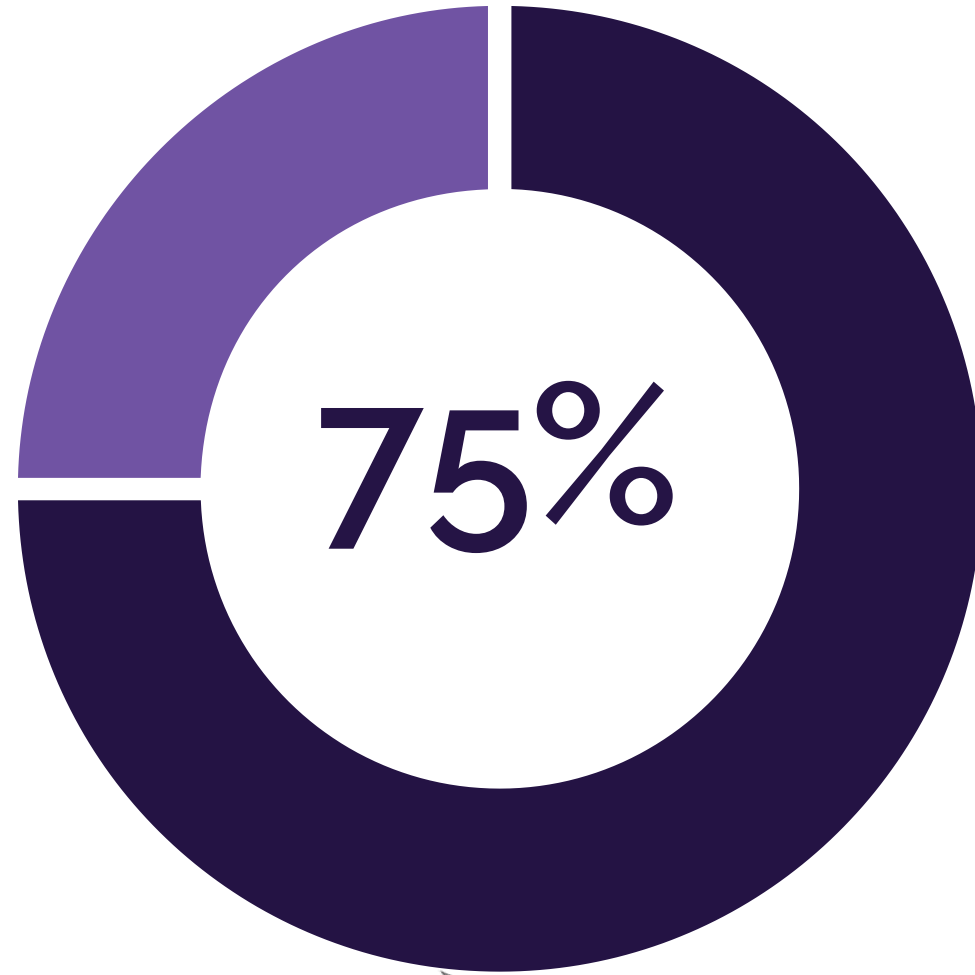


adviser

- ✓ Fiduciary Duty
- ✓ The Right People
- ✓ Growth Mindset

My Story





Core Values



Get it
done



Core Values

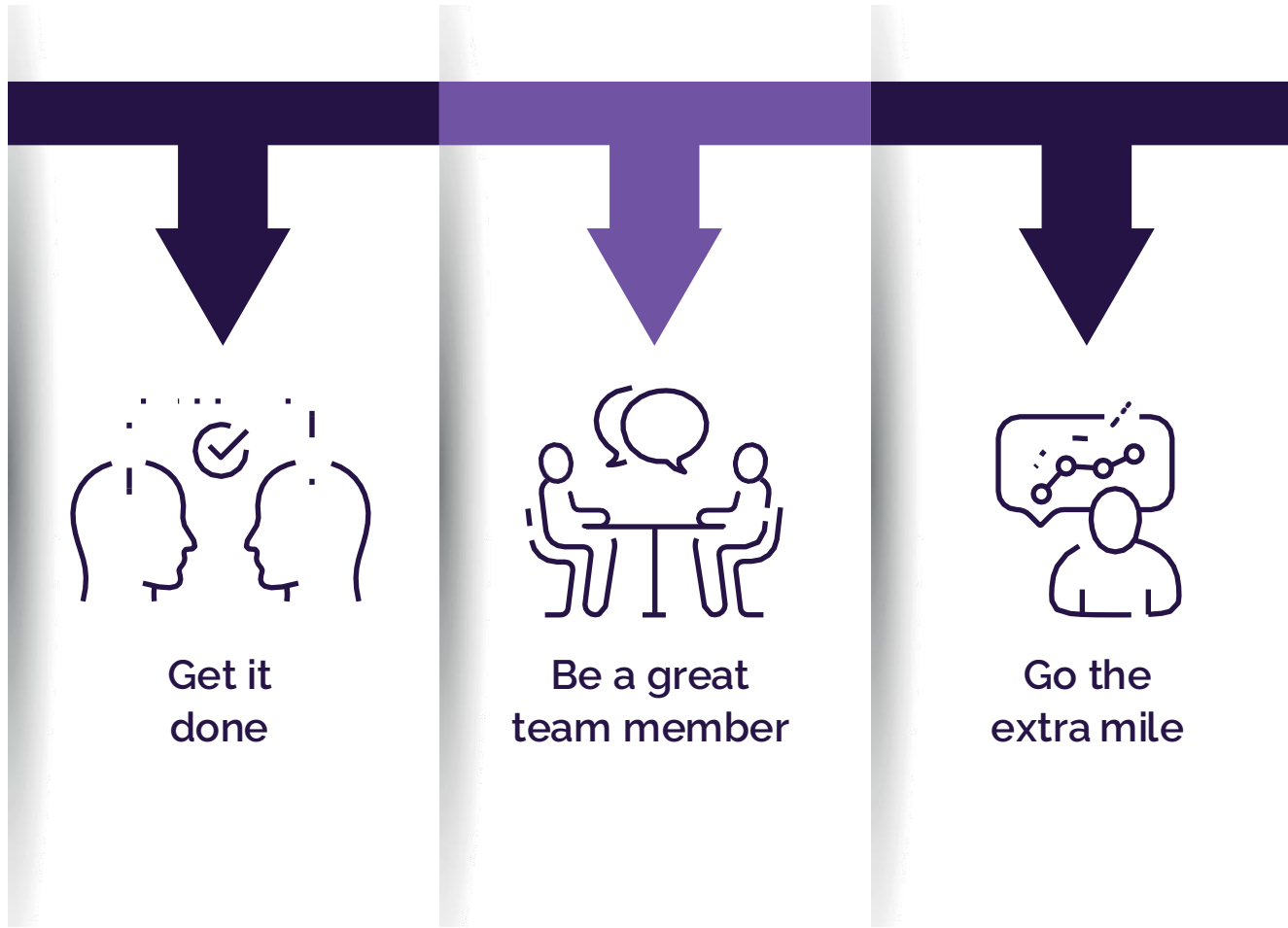


Get it
done

Be a great
team member



Core Values



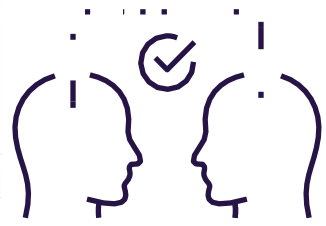
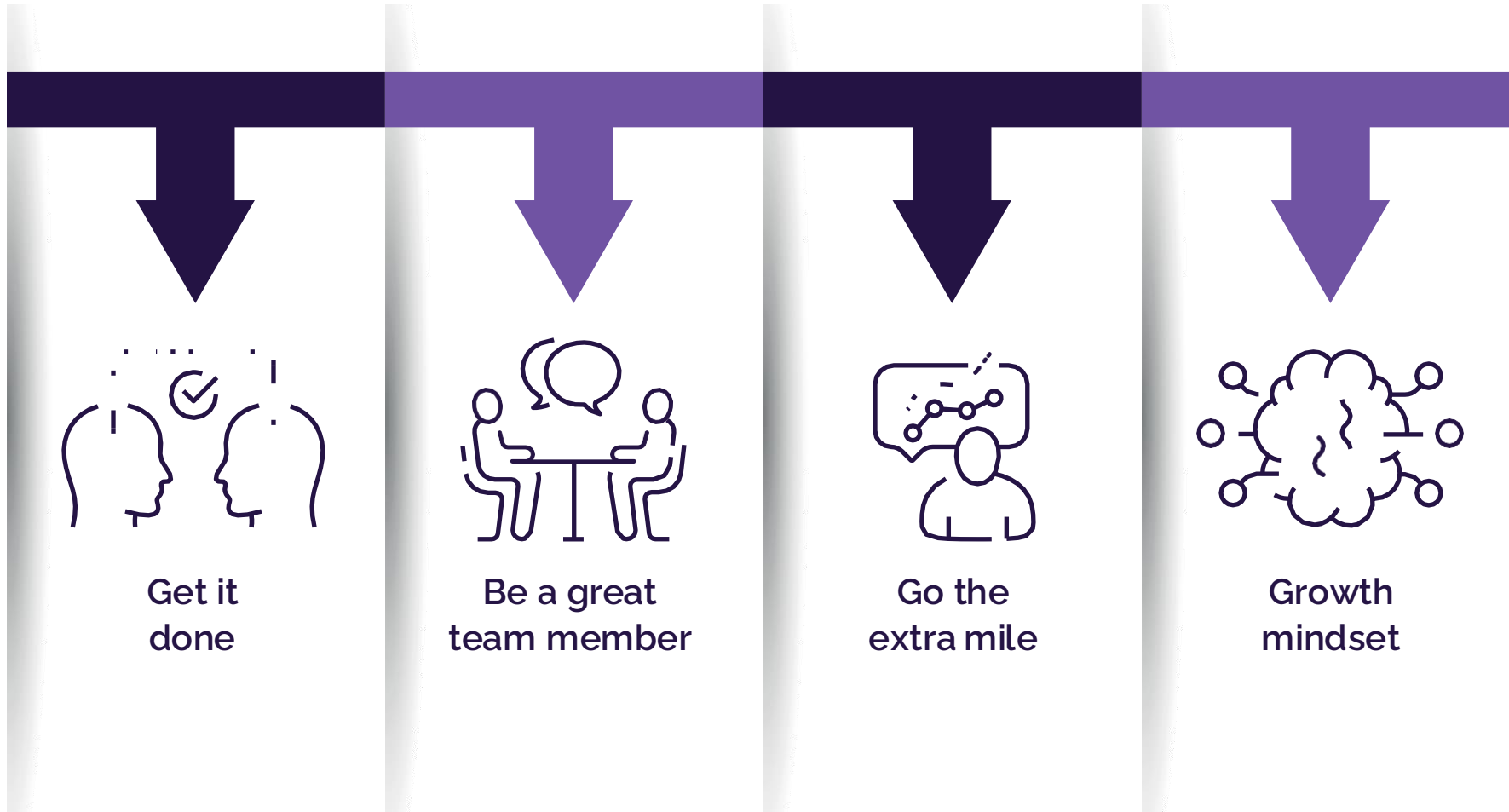
Get it
done

Be a great
team member

Go the
extra mile



Core Values



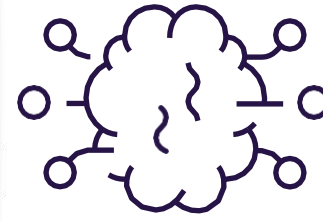
Get it
done



Be a great
team member



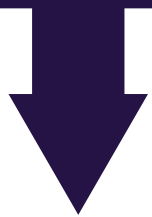
Go the
extra mile



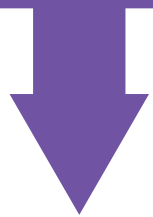
Growth
mindset



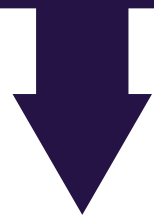
Core Values



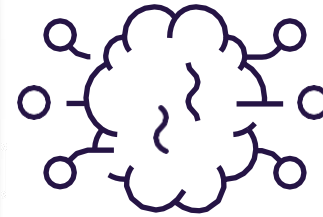
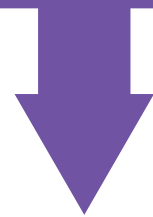
Get it
done



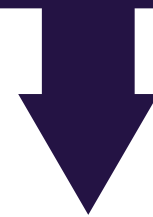
Be a great
team member



Go the
extra mile



Growth
mindset



Make the client
love you







Wealth Matters

TRUST LIMITED



Wealth Matters

TRUST

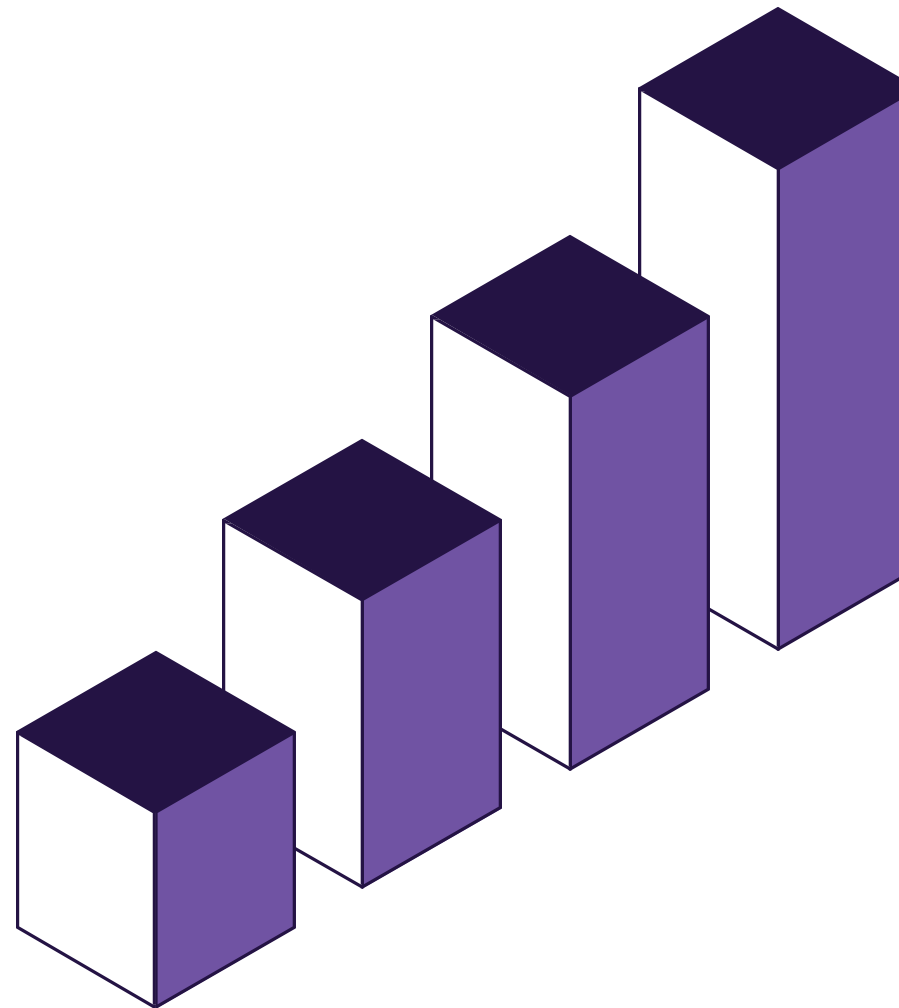
Organic or inorganic?



Organic Growth



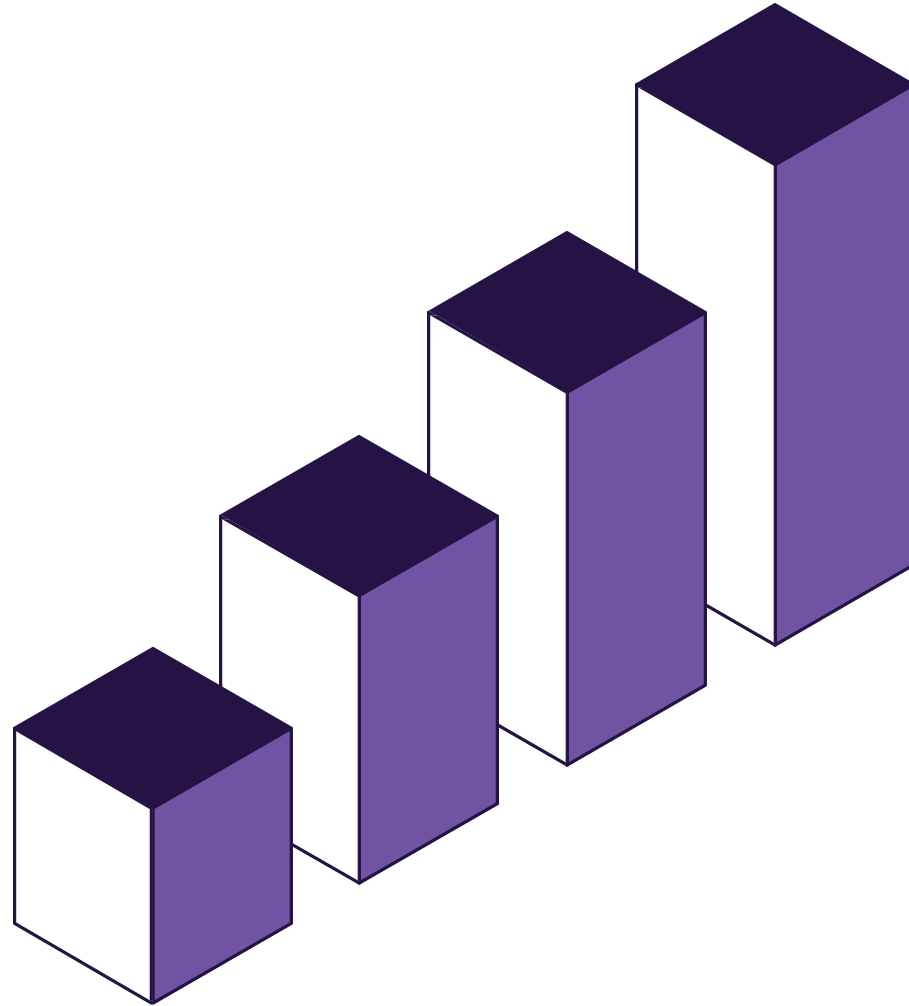
✓ Wealth Matters Trusts Ltd



Organic Growth



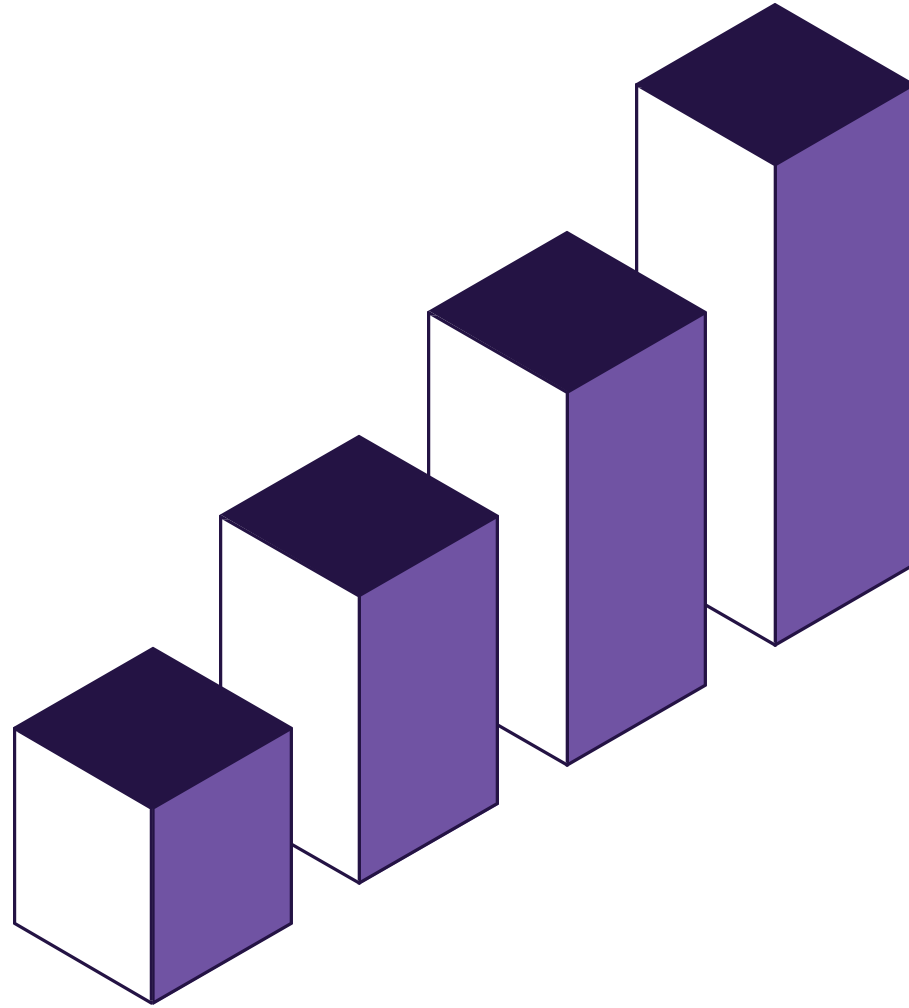
- ✓ Wealth Matters Trusts Ltd
- ✓ Contractors



Organic Growth



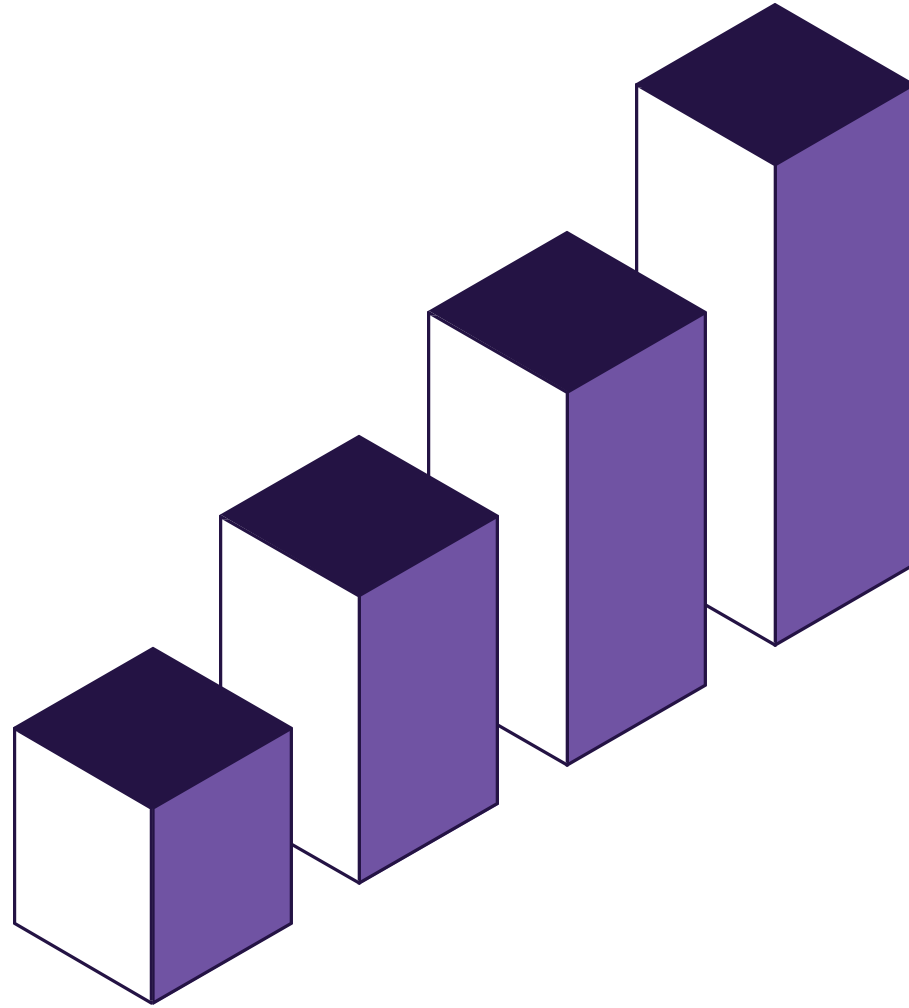
- ✓ Wealth Matters Trusts Ltd
- ✓ Contractors
- ✓ Referrals



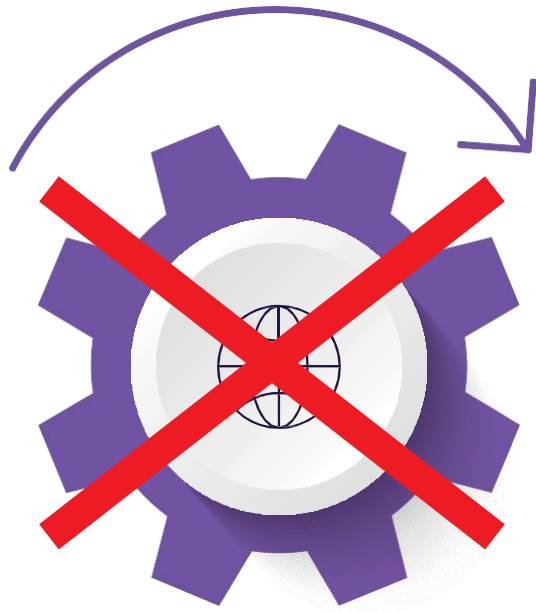
Organic Growth



- ✓ Wealth Matters Trusts Ltd
- ✓ Contractors
- ✓ Referrals
- ✓ Business from Existing Clients

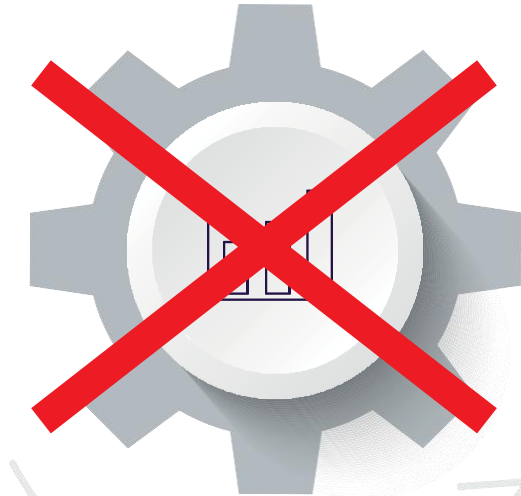


Organic Growth



Marketing

Social Media



SEO (Search
Engine
Optimisation)



Inorganic Growth: Mergers & Acquisitions



**MUST
HAVE**

revenue,
costs,
and profits
for each year



Inorganic Growth: Mergers & Acquisitions



**MUST
HAVE**

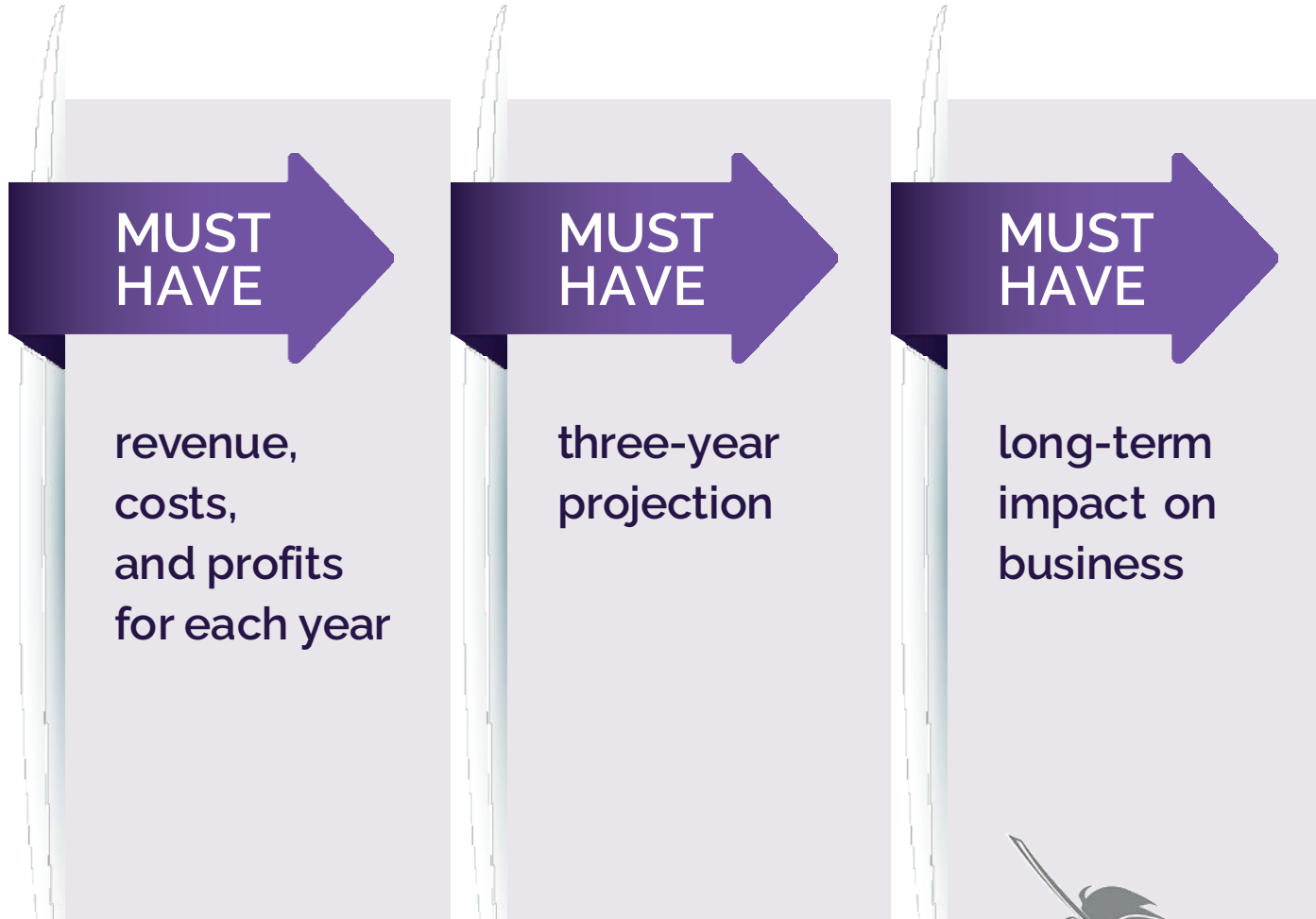
revenue,
costs,
and profits
for each year

**MUST
HAVE**

three-year
projection



Inorganic Growth: Mergers & Acquisitions



revenue,
costs,
and profits
for each year

three-year
projection

long-term
impact on
business



Inorganic Growth: Mergers & Acquisitions



**MUST
HAVE**

revenue,
costs,
and profits
for each year

**MUST
HAVE**

three-year
projection

**MUST
HAVE**

long-term
impact on
business



prepared to
take on risk
and debt



you'll get a
mixed bag



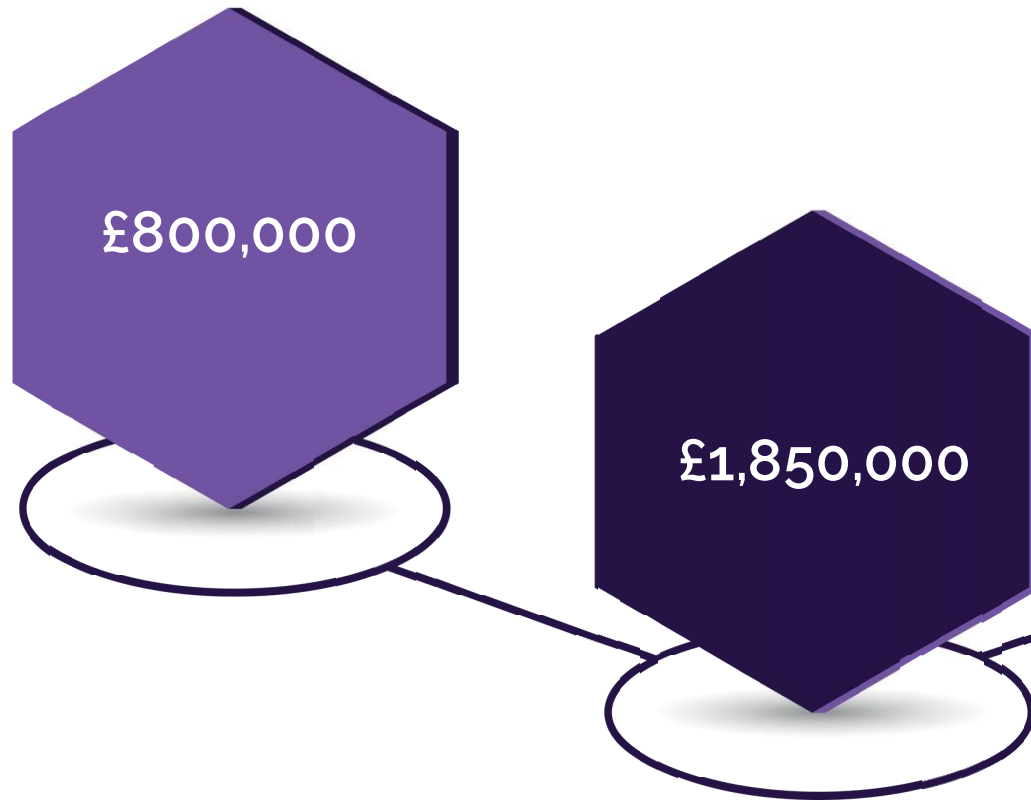
WM's Inorganic Growth



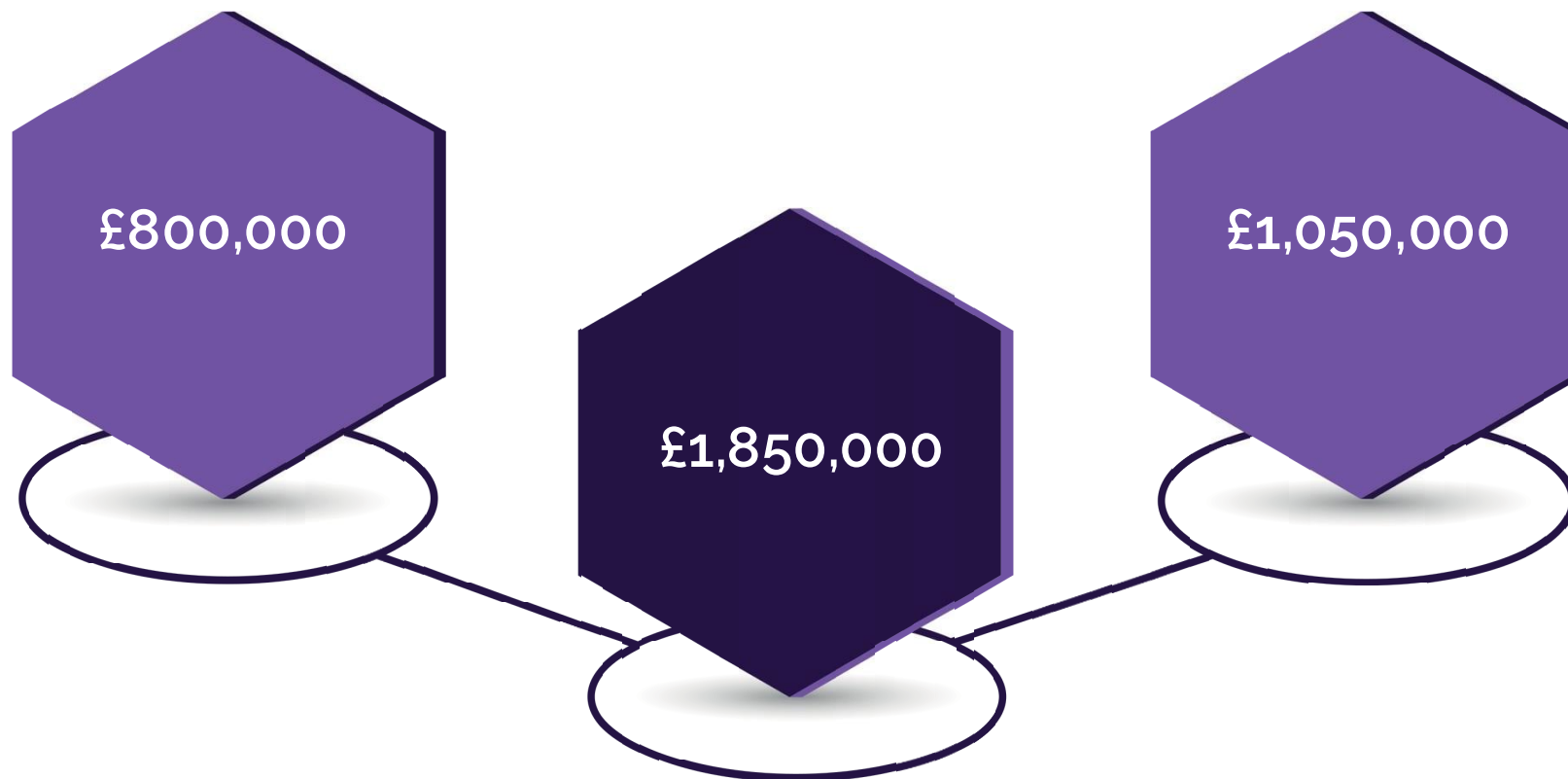
£1,850,000



WM's Inorganic Growth



WM's Inorganic Growth



Acquisitions: What to Look For



Acquisitions: What to Look For



Acquisitions: What to Look For



Acquisitions: What to Look For



Additional Benefit of Inorganic Growth



- ✓ ability and client capacity to recruit additional advisers



Chris James APFS CertPFS (Securities)

Chartered Financial Planner

12 Years' Experience

Top Adviser at Openwork

Proven Track Record



Additional Benefit of Inorganic Growth



- ✓ ability and client capacity to recruit additional advisers



Chris James APFS CertPFS (Securities)

Chartered Financial Planner

12 Years' Experience

Top Adviser at Openwork

Proven Track Record



Graham Dormer

Independent Financial Planner

Significant Work Experience

Proven Commercial Track Record





Dan Sullivan





Alice
Jordan



Wealth Matters Vision Traction Organiser



Wealth Matters Vision Traction Organiser



Core Values



Core Focus



Wealth Matters Vision Traction Organiser



- ✓ Core Values
- ✓ Core Focus
- ✓ 10 Year Target from 2020



Wealth Matters Vision Traction Organiser



- ✓ Core Values
- ✓ Core Focus
- ✓ 10 Year Target from 2020
- ✓ Marketing Strategy




Wealth Matters Vision Traction Organiser



-
- The background features a dark blue gradient with a subtle pattern of binary code. In the foreground, there are several stacks of silver and gold coins. Overlaid on the coins are several upward-pointing arrows in shades of blue and green. A line graph with white dots and connecting lines is also visible, showing an upward trend. Percentage values like '+2%', '+4%', '+6%', and '+8%' are scattered near the arrows and the graph.
- ✓ Core Values
 - ✓ Core Focus
 - ✓ 10 Year Target from 2020
 - ✓ Marketing Strategy
 - ✓ Long Term Issues List


Wealth Matters Vision Traction Organiser



- 
- The background features a dark, moody image of several stacks of coins. Overlaid on the coins are several blue and white arrows pointing upwards, indicating growth. Some arrows are accompanied by percentage labels: +2%, +4%, +6%, and +8%. A line graph with data points is also visible, showing an upward trend.
- ✓ Core Values
 - ✓ Core Focus
 - ✓ 10 Year Target from 2020
 - ✓ Marketing Strategy
 - ✓ Long Term Issues List
 - ✓ 3-Year Plan

Wealth Matters Vision Traction Organiser



- 
- ✓ Core Values
 - ✓ Core Focus
 - ✓ 10 Year Target from 2020
 - ✓ Marketing Strategy
 - ✓ Long Term Issues List
 - ✓ 3-Year Plan
 - ✓ 1-Year Plan

Wealth Matters Vision Traction Organiser

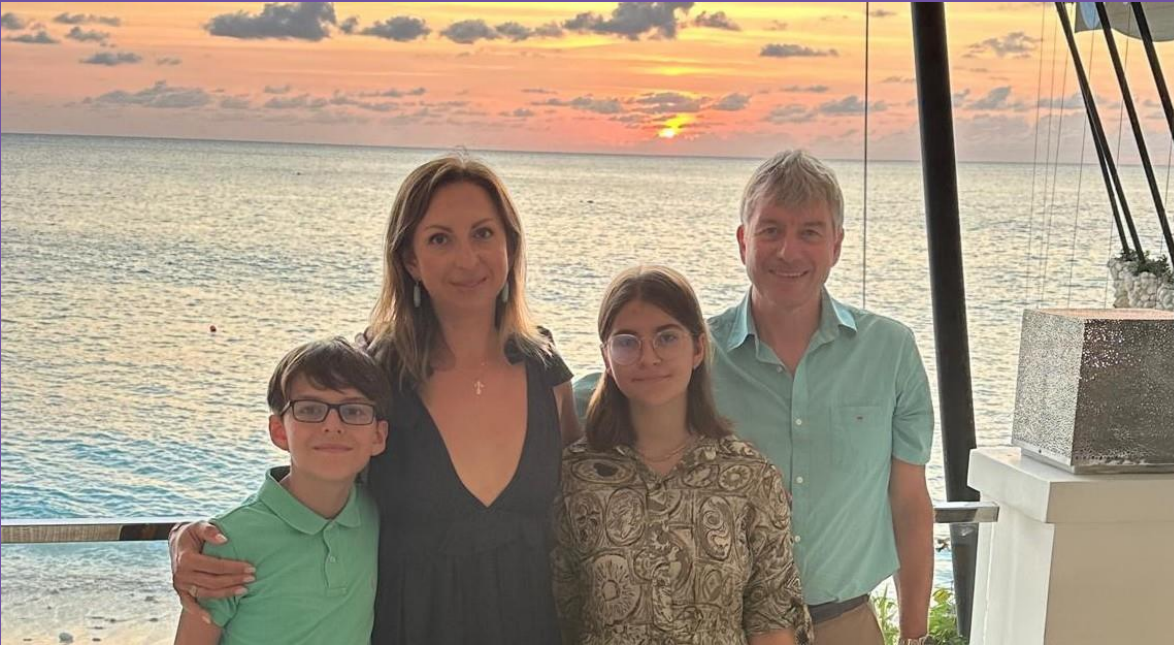


- ✓ Core Values
- ✓ Core Focus
- ✓ 10 Year Target from 2020
- ✓ Marketing Strategy
- ✓ Long Term Issues List
- ✓ 3-Year Plan
- ✓ 1-Year Plan
- ✓ Rocks

People the Business Relies Upon

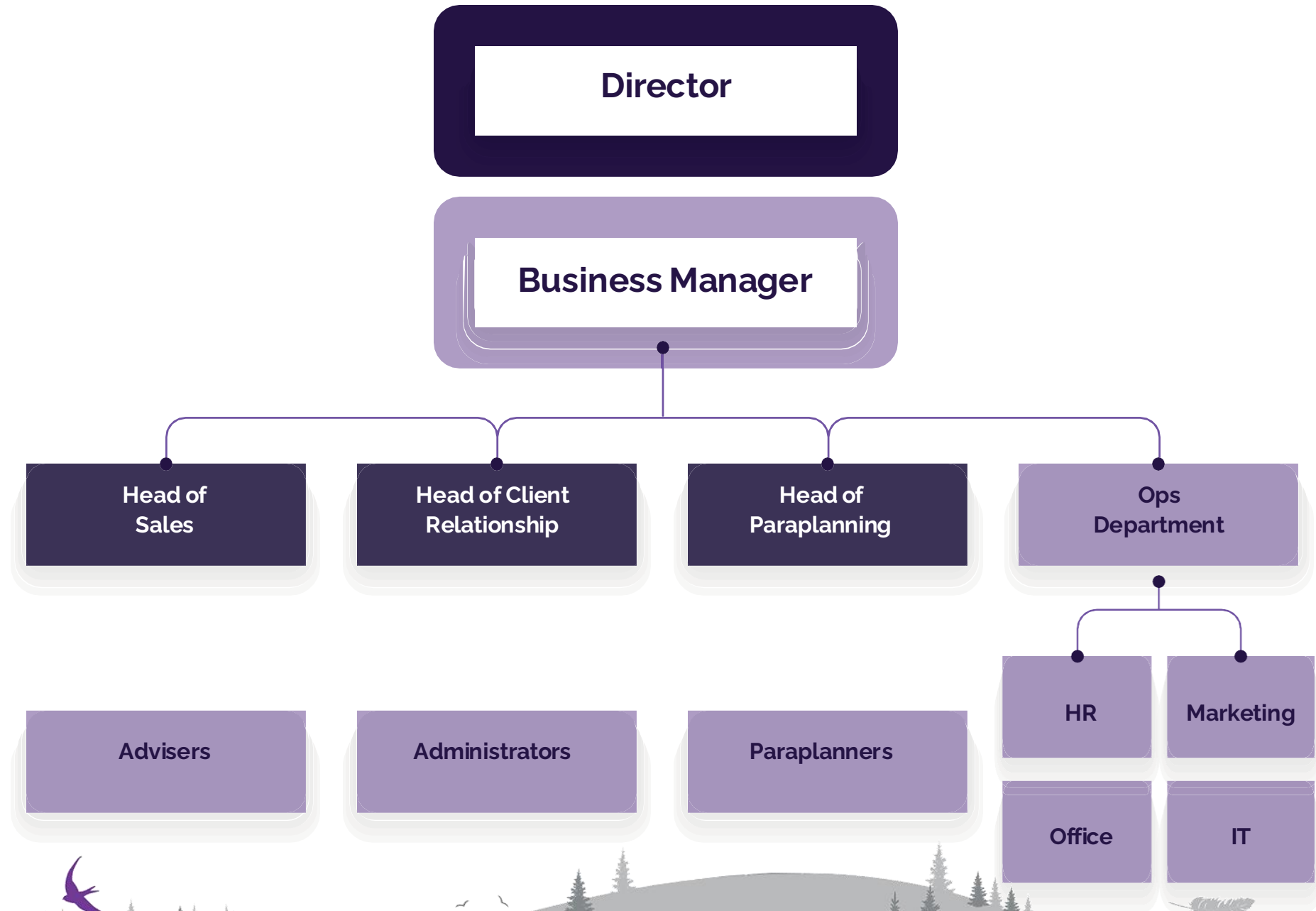


People the Business Relies Upon



You need a management team

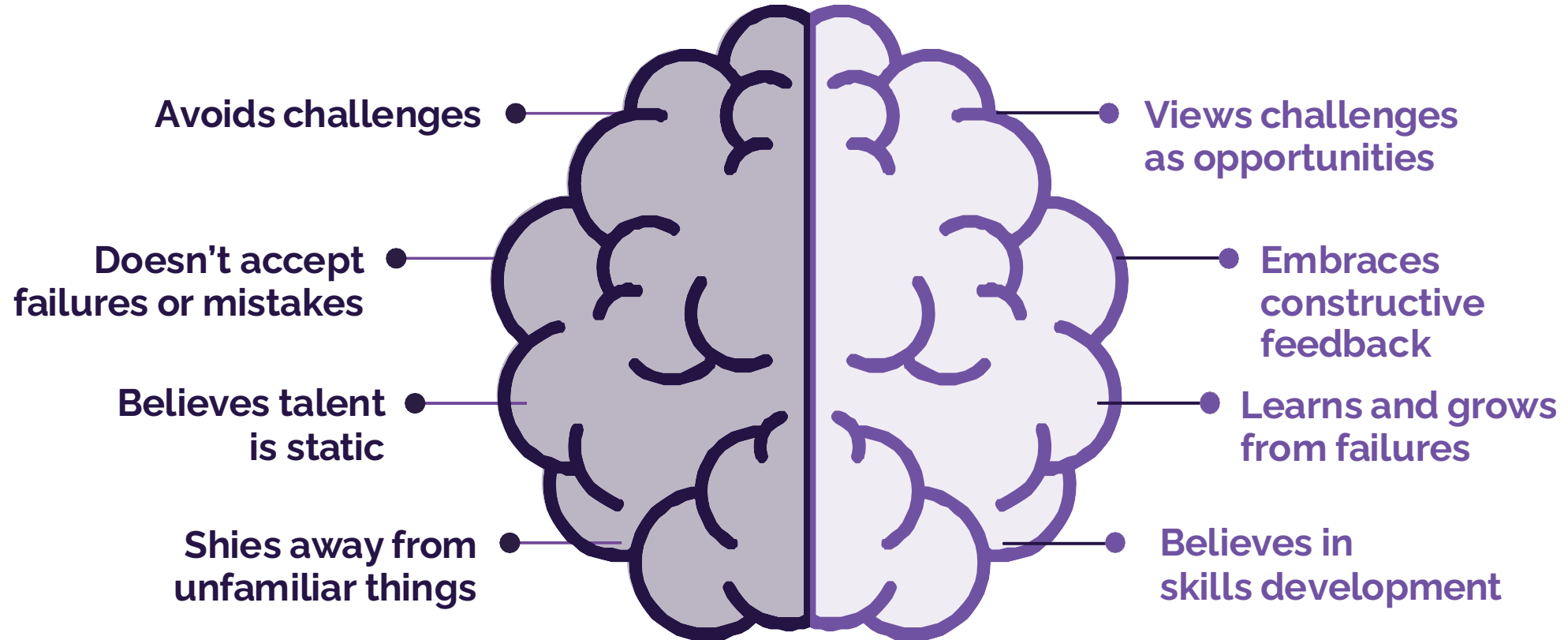




Fixed Mindset vs Growth Mindset



Fixed Mindset vs Growth Mindset



Wealth Matters

3 Year Picture



£6.4m Revenue

800 Clients

£610m AUM



Wealth Matters

3 Year Picture



£6.4m Revenue

800 Clients

£610m AUM

AI Company wide
processes using AI



Wealth Matters

3 Year Picture



£6.4m Revenue

800 Clients

£610m AUM

AI Company wide
processes using AI

22-25 Headcount

1 CEO

6 Advisors

3 Paraplanners

6 CRMs

1 Head of Investment
Planning

6 Ops

Q & A



Resources:





Wealth Matters

DESTINATION: FINANCIAL FREEDOM

