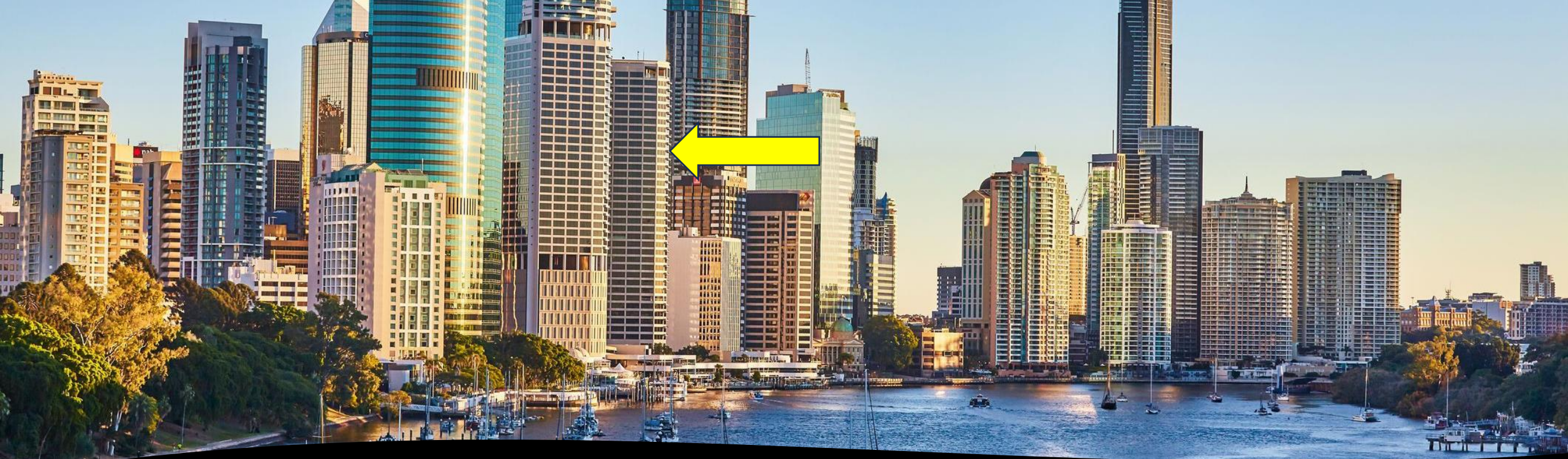


Operations: The Engine of Scalable Growth

Frankie Case, Chief Operating Officer – Wealth Matters





Over 15 years in
Financial Services

Over 7 years in
Management

Corporate Receptionist
Business Support Officer
Financial Planning Admin
Paraplanning
Office Manager
Business Manager
Chief Operating Officer



Julian Gilbert
Founder and CEO of Wealth Matters



Chris Barnes
Business Consultant & Board Adviser



Jonathan Armes
Founder, Chief Psychologist & Management Leadership
Consultant



Richard England
Founder & Business Consultant



Sonia Wheeler
Business Owner, Managing Director & Chartered
Financial Planner

What are
you trying
to build?

GROWTH

LIFESTYLE

LEGACY

CAPITAL EXIT



What is Operations?



Accountability



Visibility



Structure



Scalability



Consistency

“Business Growth will amplify every Operational Weakness you have”

The Roadmap



Capacity

Structure &
Ongoing
Accountability

Experts to
Elevate

Policy &
Process,
Systems &
Tools

People &
Culture

Data

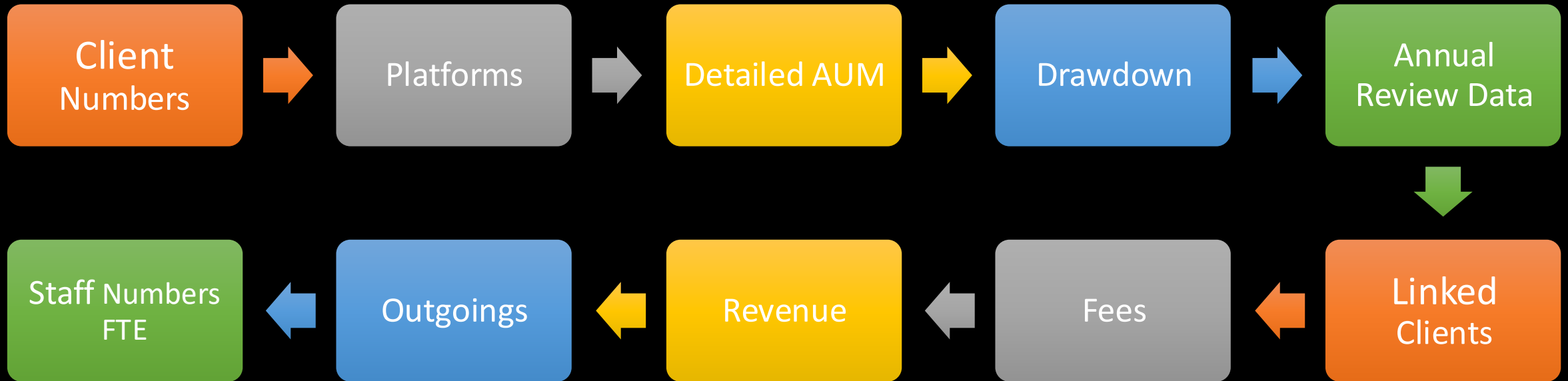
Leadership

A photograph of a conductor in a dark suit, seen from the side, leading an orchestra. The conductor's right arm is raised, and his left hand is positioned lower. The orchestra members are seated in rows, playing various instruments including violins and cellos. The background shows the ornate interior of a concert hall with wooden paneling and a high ceiling. The entire image has a dark, semi-transparent overlay.

Step 1 – The Right Leader

- Financial Planning Experience
- Leadership Capability
- Evidence of Delivery
- Will they win over your people?

Step 2 – Know Your Data



Your data reveals your operational problems.
If you can't see the problem, you can't fix the problem.

Step 3 – People and Culture

G

‘Do they
GET it’

W

‘Do they
WANT it’

C

‘Are they
CAPABLE’

+

A

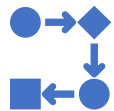
‘Are they
ALIGNED’



Step 4 – Policy & Process, Systems & Tools



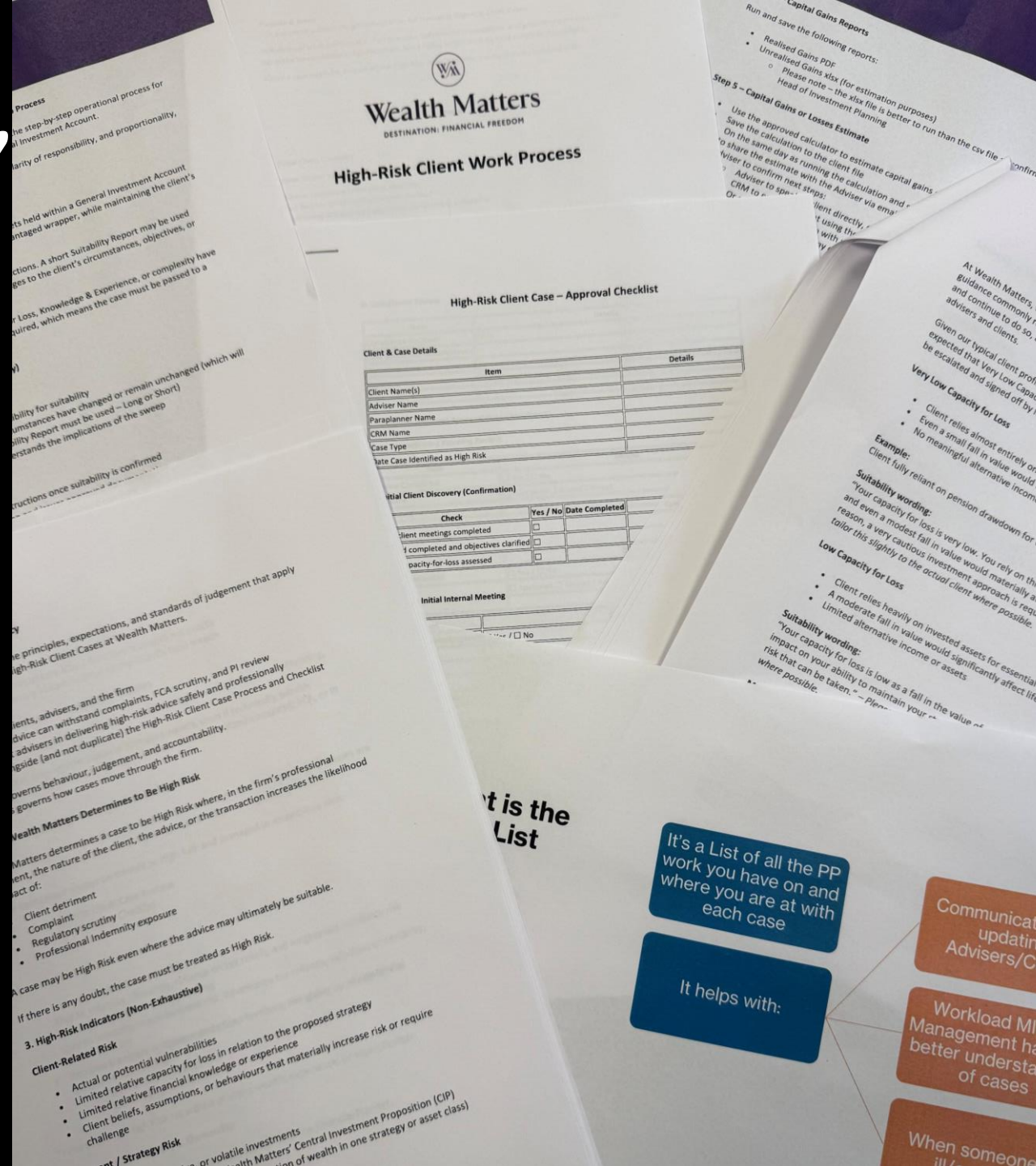
Policy: The Rules & Standards



Process: The Sequence & Workflow



Systems & Tools: The Technology & Infrastructure to enable them



Step 5 – Leverage Experts



Dawn O'Shea

Director and
Recruitment Specialist

CV Elite



Mel Holman

Managing Director and
Compliance Specialist

CATS



Rupert Davey

Managing Director and
IT Specialist

CTM

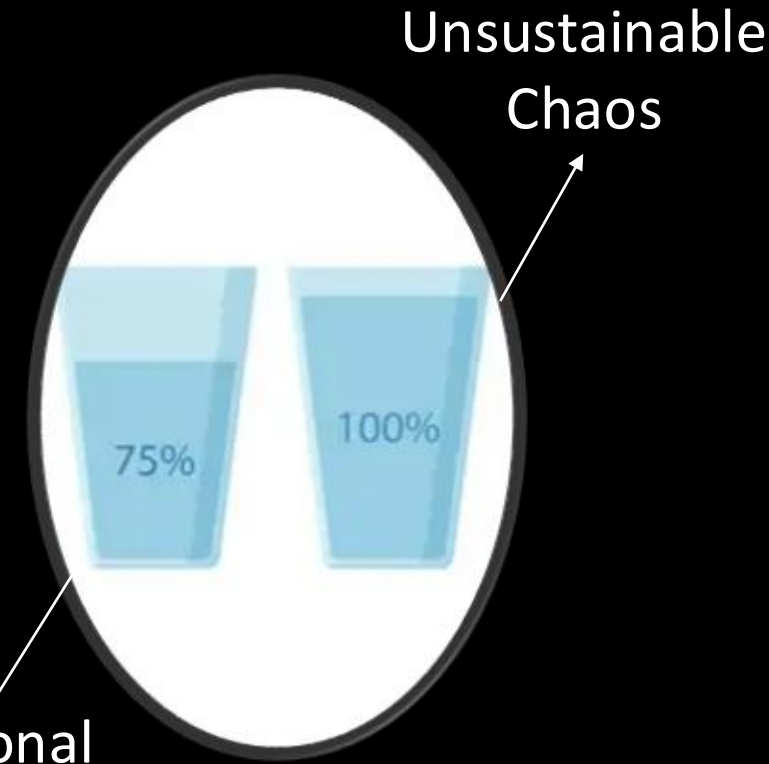
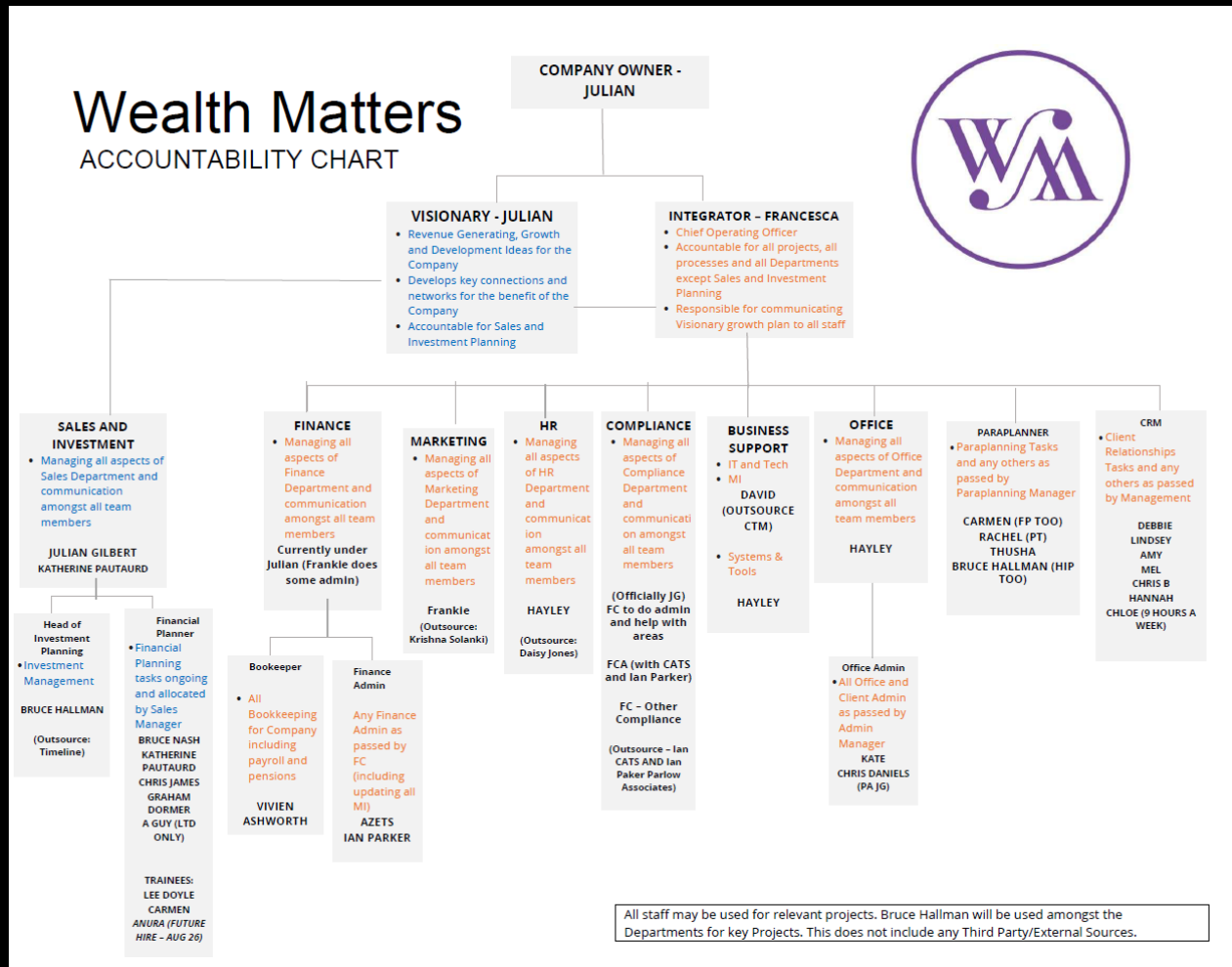


Daisy Jones

Partner and Employment
Lawyer

Fox Williams

Step 6 – Structure and Capacity



Unsustainable
Chaos

Operational
Excellence
Controlled
Growth

“Any business can grow.
Not every business can survive its own growth.
Decide which one your business is.”