

# AWS principal announces change of licensee & new era for the advice practice

Principal and founder of Australian Wealth Solutions Pty Ltd (AWS) Sam Zervides has announced that effective this month, the advice practice will operate under the AFSL of Melbourne headquartered boutique licensee ASVW Financial Services Pty Ltd (ASVWFS).

Commenting further on the announcement, Sam Zervides said the move to ASVWFS was the first step in a long-term strategy to position the advice practice to address the needs of the modern, more sophisticated client in the rapidly evolving advisory services landscape.

In addition, a key objective of the AWS principal is to embrace the latest, best of breed new technologies and processes and apply them with the 'human touch' that has been fundamental to the success of the advice practice since its inception.

The move to ASVWFS also follows Sam Zervides decision not to renominate for the position of Victorian President of the Institute of Public Accountants (IPA) in last year's election in order to focus on positioning the financial advice business for the future.

In welcoming AWS to ASVWFS, CEO and Director Stuart Abley said it was a pleasure to have them join the national licensee.

"Sam and the AWS team embody the very important fundamentals we are seeking in the practices that join our national network i.e. committed to building exemplary advice businesses that deliver the highest standards of compliant professional financial advice and client service".

Changes in client expectations are shaping the structure of advice businesses and are irreversible affirmed Sam Zervides.

"It's for this reason that I'm focussing my energies on the future and being ahead of the curve in responding to the needs of an increasingly sophisticated and mature client – many of whom reside interstate and overseas but still demand the highest standards of personal and accessible advisory services".

Utilising the resources of ASVWFS, the first of two critical priorities for Sam Zervides will be to further improve the client experience through the utilisation of advanced technology, latest processes and innovation to improve engagement, outcomes and service.

New complementary financial and lifestyle services and value-add offerings are also being developed and well advanced and include a private wealth and finance offering. They will be provided in-house or in partnership with appropriate alliance partners and recognise that financial strategies are not standalone undertakings.

The second priority reflects Sam's commitment to AWS's most important asset – the people that comprise the business. In order for advisers and administrative staff to operate at their best, they will have access to skills training and ongoing professional development opportunities, as well as leading-edge technology.

Sam Zervides concluded, "The AWS team are very excited about the move to ASVWFS and the prospects for the future.

"In particular the benefits that will be derived through the application of new technologies designed to significantly improve the client experience and connectivity; enhance/streamline administrative processes; and accelerate the delivery of additional lifestyle and financial service offerings".

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## About ASVW Financial Services Pty Ltd

ASVW Financial Services Pty Ltd (ASVWFS) is a national boutique Licensee headquartered in Melbourne.

Established in 2020, ASVWFS sets itself apart from its competitors by offering a true business growth strategy that allows advice practices to maximise the value of their business while delivering quality advice outcomes to their clients.

ASVWFS provides opportunities for practice owners to join ASVWFS at a variety of different entry points depending on the size and maturity of the existing business, and the goals of the principal.

As an Australian Financial Services Licensee, ASVWFS provides its national advice network with professional and effective licensing solutions, access to market leading technologies and succession pathways for businesses seeking to exit in the short to medium term.

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