

# Improving financial literacy & personal coaching are keys to adviser / client success

Sentry Group Chairman and Managing Director Murray Hills said irrespective of the digital age, increased regulation and compliance, the bar has irreversibly changed for what it means to be a successful professional financial adviser and Sentry's Aspire Partner practices are leading the way.

Our Sentry Advice Aspire Partners program emerged after Sentry reviewed its business model and moved away from being just a licensee to a holistic business and professional services firm.

Commenting further Murray Hills said Sentry's high-performing Aspire Partner advice businesses stand out for their client focus and growth mindset. "They are using a range of strategies, systems and initiatives to improve productivity and deliver benchmark client experiences that in turn are the source for new business growth, referrals and alliance opportunities".

Head of Advice and Senior Financial Adviser Shane Light of Melbourne based The Hopkins Group is a firm believer in the holistic provision of advisory services by including programs that improve financial literacy, mentoring and career development of clients.

Although it can come with many challenges, Shane admits he is personally and professionally thriving improving the understanding of clients on ways they can protect and achieve their financial aspirations.

Shane started his financial services career in Wollongong as a mortgage broker / accountant in 2002. Five years later he became an adviser before relocating to Melbourne in 2010 and in July 2015 joined The Hopkins Group.

Promotion to partner was achieved in December 2017 and more recently he received distinction as a semi-finalist in the 2018 AFA Adviser of the Year Award.

The one-dimensional traditional advice practice model of client-in / advice-out is all but gone said Shane Light. Staying relevant to the times and the changing needs of clients is paramount and the foundation for a strong vibrant practice of the future.

"Financial literacy is the cornerstone of any good financial strategy and helping each demographic, especially Millennials and Gen X and Ys, break down the jargon and get excited about their finances is an incredible opportunity", added Shane Light.

"The Hopkins Group invest heavily in client engagement and experience strategies with constantly evolving programs at their core that are designed to educate and generate conversations".

"Money Master, Bubbles Beers Budgeting and Future First Homeowners are examples of creative programs and campaigns developed to entice and engage a new generation in good financial behaviour".

Talking Sport is another initiative where Shane presents at sporting clubs on the impact and consequences an on-field injury can have on a professional athlete. Relatively short careers are made even shorter when earning capacity ceases from an injury catastrophically putting an end to the potential for a financially secure future.

As the result of the financial education programs and privileged position as trusted financial adviser Shane is called on by clients to help them gain clarity and perspective on their lives and careers.

Shane continued, "Coaching and mentoring on career progression, overcoming the hurdles to first home ownership, starting a business and other life challenges was an inevitable evolution to come out of the client-facing relationship-focused activities.

"Demand is definitely going to grow for this as an integrated offering within the ongoing adviser-client journey".

Looking to the future beyond FASEA and the Royal Commission, Shane is confident The Hopkins Group is more than ready. The practice has an appetite for adviser growth and expansion including acquisition where appropriate provided they can be managed and are a cultural fit within the group.

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Notes to the Editor: About Sentry Aspire Partners

In 2017, believing that the old dealer model was on the verge of extinction, Sentry engaged an independent industry consulting firm, to undertake a review of our business with key objectives to:

1 understand and review the current services delivered by Sentry via our licensee offering to advice businesses

2 benchmark the Sentry offering against a relevant set of peers around services, pricing, market positioning and growth options

3 consider and recommend changes, where required, to assist in gaining additional market share of quality advice practices whilst retaining high quality existing firms

After comparing many scenarios and considering the need to prepare for the new world where we believed that successful licensees of the future have to look, feel and act like business and professional services firms, we decided to adopt a new business model and refresh our licensee offering.

That new model embraced a fixed for service combined with a defined service package providing advice businesses with value for money, called Aspire.

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