

SAN – Network Concept

Backdrop

- Commoditisation in professional services
- Career boredom of '20 year-in' professionals
- Emergence of "Sense Maker"
- People looking for next chapter or body of work
- Largest ever transfer of intergenerational wealth occurring
- Succession opportunities enormous

Problem we're solving

- 1 Successful individuals and successful families don't have a family plan. They don't know where they are going
- 2 They don't have capability in agile advisers to support that journey
- 3 Advisors need a process to articulate and demonstrate the value that they can help the clients on this journey

Learning Outcomes

- 1 A framework to help families articulate their desired future
- 2 How to demonstrate your capability to support that journey
- 3 Additional adviser skills in personal, business & client mastery to broaden your skills sets from your existing swim lanes
- 4 Client collateral to demonstrate concepts and run a 12 month client agenda

Networks

A Network consists of 10-15 advisers from wealth, tax, legal & independent directors etc. Mainly they are professionals 10-20 years into their career.

They are current partners in Accounting, Legal and Wealth firms; who are career bored, looking for their next chapter of work.

