



Principals' briefing

Madison PD Days March 2021



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Agenda

- Review 2020
 - Conversations with Principals
 - Clime Group
 - Madison update
- Introducing the Adviser Council
- Focus areas and projects: Jan – Jun 2021
- Community news



Review 2020



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Insights from our conversations

- Increase team capability/capacity
- Defined documents & processes
- Increase digital engagement/business tools
- Growth – clients & profit
- Client engagement & education

Business

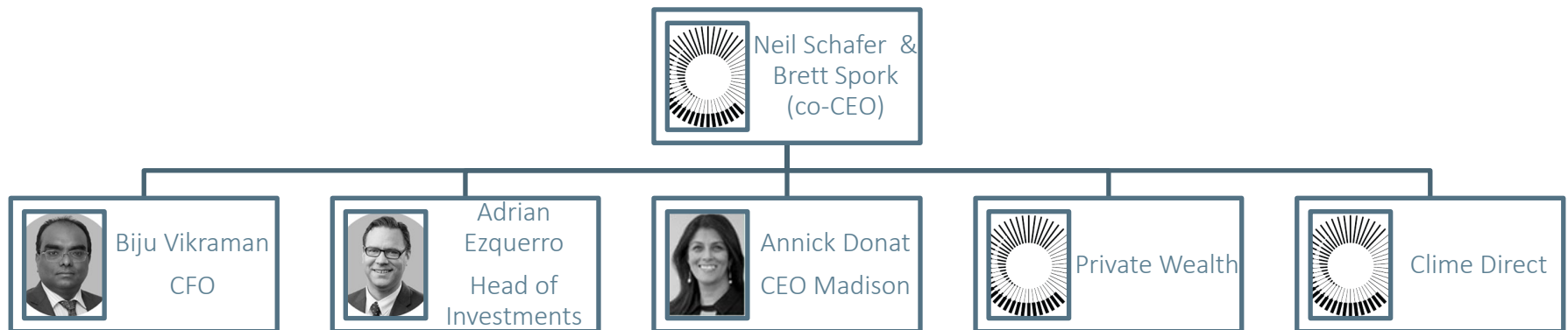
- Generally optimistic
- Pay it forward
- Confidence
- Balance
- Great client conversations

Owner



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Clime Group



Our Board & Leadership team



Brett Spork
Chairman



John Abernethy
Director



Neil Schafer
Director



Biju Vikraman
CoSec



Annick Donat
CEO



Jaime Johns
Head of Advice

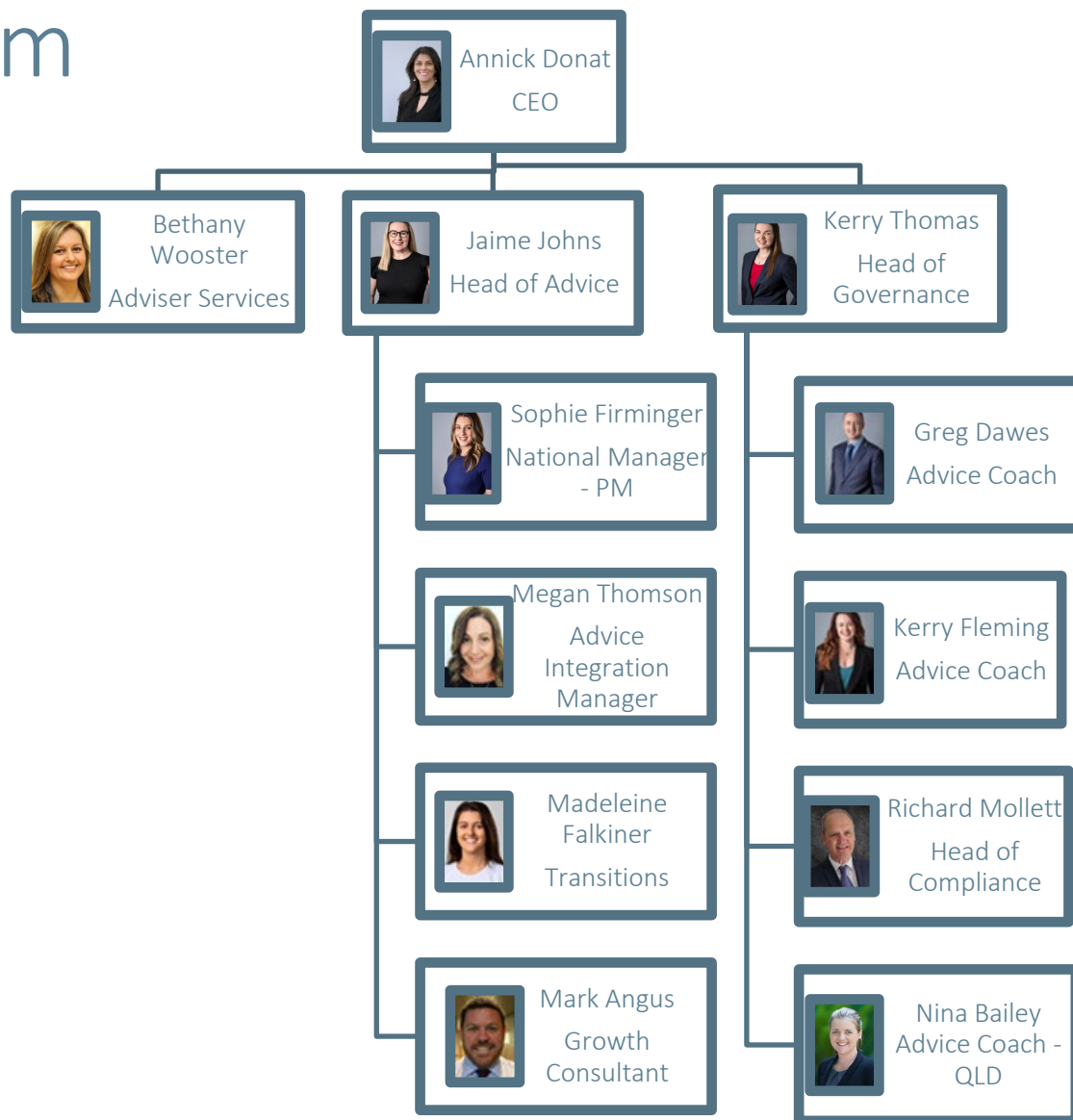


Kerry Thomas
Head of Governance



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Our team



Specialist teams and support

Client education and engagement

- Seminars (F2F)
- Webinars (white label)
- The View (white label)
- Clime Direct

Investment solutions

- Monthly teleconference (Mercer & Clime)
- Ask the PM
- Research meetings
- Access to limited offers (e.g. IPOs)
- Bespoke SMAs
- Investment services team expanded
- WealthPortal/Proactive

Macro-economic communications

- Videos
- Newsletter copy
- Articles



Andrea Theouli

Investment Specialist



Scott Briggs

Key Account Manager



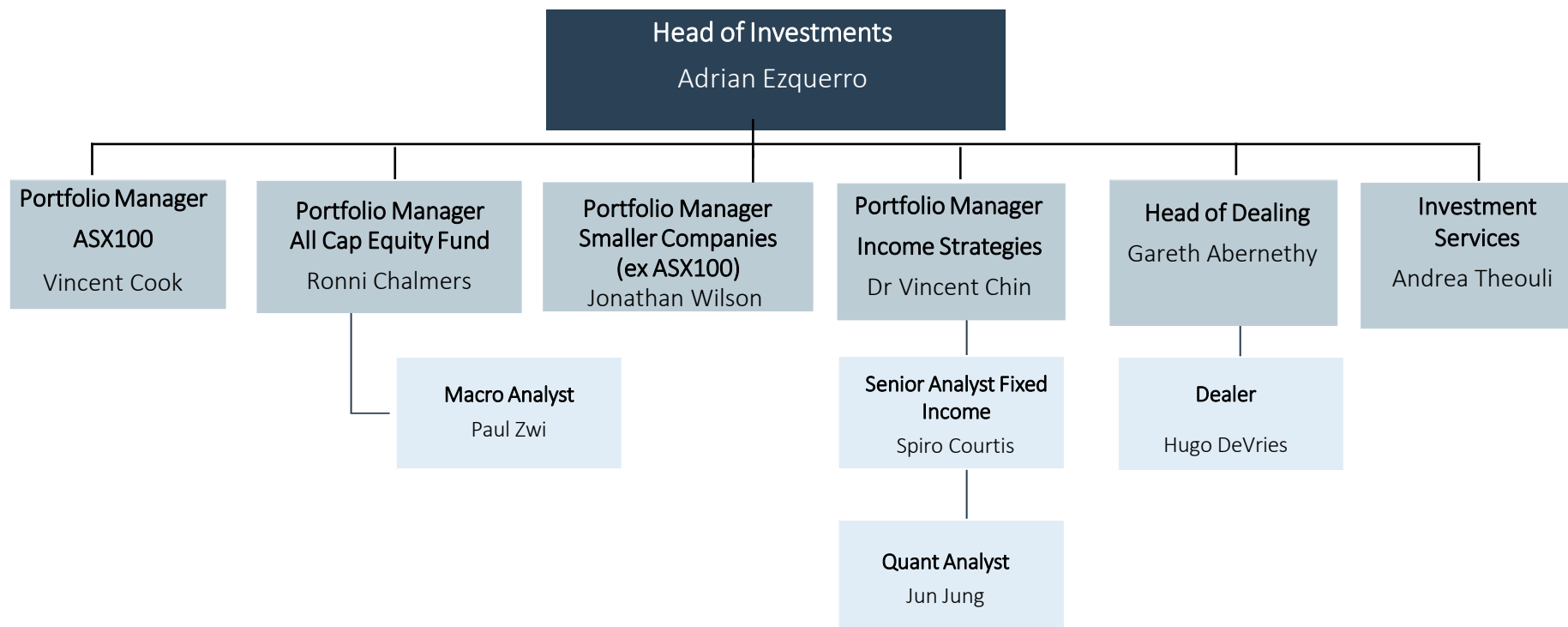
Harry Cordaiy

Key Account Support



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Investment Management Team





Focus and priorities Jan – Jun 2021

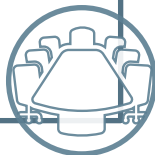


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Focus and projects: Jan – Jun 2021

- Service model and pricing
- People & resources
- Regulatory changes
- 2021 Education program
- Commence 2022 PI renewal
- Half year external audit

Business and
Governance



- Professional Year program
- Wholesale advice pilot
- New SOA pilot
- Active Reviews
- Outsource paraplanning pilot
- Weekly webinars

Advice



- Monthly Investment updates
- PM 1:1 support
- Proactive Portfolios 'house view'
- Wholesale advice pilot
- Investment articles
- Bespoke SMAs

Investment solutions
and services



- Webinars
- Seminars
- Education Collateral
- Clime Direct (research portal)

Client engagement &
education



- Wealth Portal
- BT Panorama migration
- IRESS/OneVue ecosystem
- Opex/Xeppo

Platform &
technology solutions



- Adviser Council
- Business Leaders program
- Insurance Specialists Symposium
- Investment & Portfolio Construction symposium

Leadership &
community



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Q1 Key Projects

- Wholesale Advice Pilot
- Business Dashboard - Xeppo
- Licensee Fee Pricing
- Wealth Portal reprice
- IRESS/OneVue ecosystem
- Workplace – our collaboration workspace
- Client Success Stories
- Paraplanning & administration services pilot

Education program 2021 – additions

Business Leaders Forum

- Executive leadership program
- Delivered over 12 months
- Integrating strategic leadership skills & providing challenging education opportunities
- 10 candidates annually

Insurance Symposium

- Specialist forum where we workshop complex Insurance strategies
- Share the best ideas from advisers and our education partners
- Look at future trends

Investment & Portfolio Construction Symposium

- Specialist forum where we workshop complex investment strategies
- Share the best ideas from advisers and our education partners
- Look at future trends



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Community news



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Our Community

State	Advisers
QLD	24
NSW	41
VIC	9
SA	5
WA	1
Total	80



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Community news



Welcome

Hamish Pearce
Halcyon Wealth Advisers
North Sydney | Baulkham Hills



Joining

Nathaniel Hawkins
Shawn Delaney
Aaron Miller



Professional Year

Sarah Lindsay
Zac Elliot
Caitlin Telford



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Community news



Celebrating
Peter Mullens

- 50th year within Financial Services
- Started his career with MLC
- Founded Peter Mullens & Assoc in 1977, a boutique Insurance and Superannuation business
- The original owner of the Madison AFSL, founded in 1983
- Madison leadership roles have included Director, Risk & Professional Standards Committee (Chair), Investment Committee
- Co-founded Halcyon Wealth Advisers with John Francis in 2007
- Avid skier, inc an annual skiing event with Michael Mooney and Phil Robbins



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