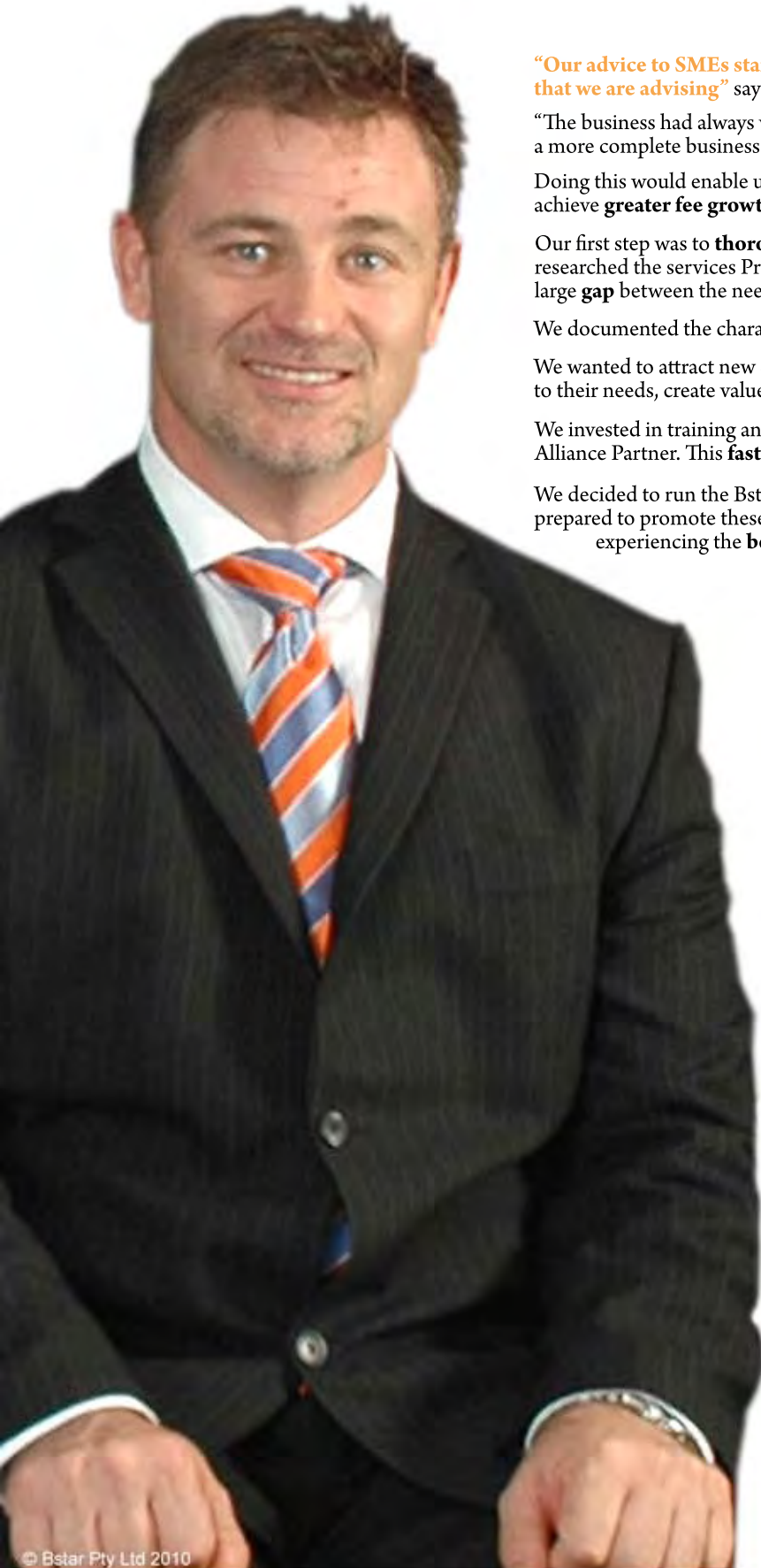


Growth... remove the uncertainty.



“Our advice to SMEs starts with the owners – it’s the people, not the business that we are advising” says Adam Goldstien from Skeggs Goldstien.

“The business had always worked with SMEs but I wanted to improve our service offering to a more complete business services solution.

Doing this would enable us to provide our clients real value added solutions and help us achieve **greater fee growth, diversification and profit improvement.**

Our first step was to **thoroughly research** SMEs to understand **their needs.** We researched the services Professional Advisers were providing SMEs and found there was a large **gap** between the needs of SMEs and the solutions being provided.

We documented the characteristics of our future **ideal client.**

We wanted to attract new SME clients by offering services that would provide **real solutions** to their needs, create value for their business and improve their personal and family lives.

We invested in training and skills development with Bstar and became an accredited Alliance Partner. This **fast tracked our growth strategy** in a **cost effective manner.**

We decided to run the Bstar Tools and Programs over our own business. We were not prepared to promote these new services to our clients without understanding and experiencing the **benefits first hand.**

We piloted our new SME offering with existing clients to gain the **confidence** to promote to new clients. Our existing clients were **amazed** by the value we could now provide them and their business.

Our approach is quite simple.

- o We start with a values based discovery meeting where we determine each clients goals, values & beliefs
 - o We want to know what motivates them, drives them, the values they hold and what’s important to them right now
 - o We use the Growth & Succession Planning Assessment to help us do this
- o Next we consider the most appropriate solutions for our clients – this is all based on their specific needs
- o In most cases we then prepare a Business Life Plan (‘BLP’). This is central to our **Principal Adviser strategy.**
- o We assist our clients in implementing and monitoring their plan typically via a **Board of Advice.**

Skeggs Goldstien are confident they have secured their future growth, through their structured approach, high value solutions and clear understanding of their target market. In the future they will further enhance their offering by developing **specialist knowledge**, within selected industries, initially focussed in the **Pharmacy and Legal** segments using Bstar’s industry specific packages.

By partnering with Bstar, accessing their Business Life Planning Program and other Materials, Tools and Programs, Skeggs Goldstien have set the **benchmark for Advisers wanting to be their client’s Principal Adviser and grow value-adding advisory revenue.**



**To start your partnership with Bstar
call 1300 552 577**