Pretium Solutions®

Client Advisory Board

Industry experts ready
to help *your* business

Updated July 2021

CONTENTS

PURPOSE

All successful athletes have one thing in common: a SPORTS COACH... Someone who understands the strategy, discipline and techniques that breed success.

For businesses, having an advisory board to discuss direction, goals and performance, is an essential part of running a successful business.

The Client Advisory Board will enable you as a business owner to build a high-performance business. It involves the efforts of several highly qualified professional advisors working together with you.

Key outcomes

The key outcomes of a Client Advisory Board include:

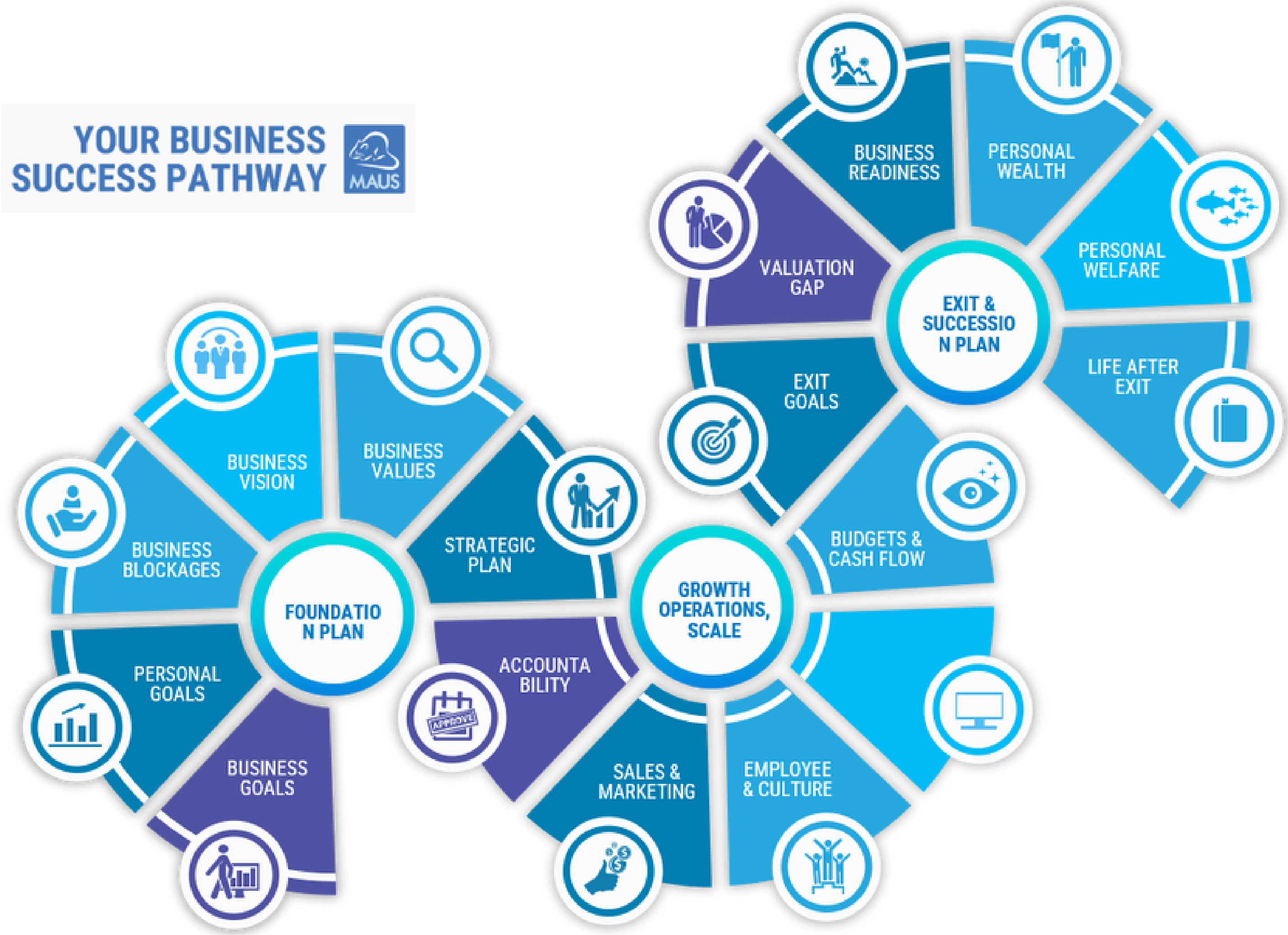
Business outcomes

- Clear direction and less stress
- Improved profitability & business value
- Accountability and good decision-making
- Exit planning readiness
- Best practice framework

Personal outcomes

- Not feeling alone or uncertain - more confidence
- Less stress as a result of a clear direction
- Become invigorated, motivated & inspired
- Learn new business skills from advisors with real-world experience

The Business Success Pathway



When business goals are not being achieved, it generally means that there are two or three key issues that haven't been solved satisfactorily. Long term solutions are required to prevent the business owner from 'putting out the same fires' over and over again. It's accepted that every business will have a dozen or more issues, but in general there are **three or four 'make or break' problems that stop a business owner reaching their goals.**

The biggest issue of course is that **'you don't know what you don't know'**. In other words, while there are proven solutions to business problems, the business owner may not know the right questions to ask to find them. Instead, business owners will often resort to guess work and 'band-aid' solutions. The Client Advisory Board brings together information and advice from qualified, experienced business professionals like you.

One person cannot know everything. That is why our Client Advisory Board will provide a unique opportunity for you and your business as you move through each stage of the business success pathway.

HOW IT WORKS

A group of interconnected disciplines in a **collaborative Board of Advisors** help you, the business owner, work on the common goal of **building a valuable business**.

A further aim is to assist you, personally, to use your skills and resources beyond your business and into creating **new opportunities throughout your life**.

The Client Advisory Board will work with you in the following areas:

- Identify your **goals** and assess your financial and mental **readiness** to implement strategic actions and to be satisfied with the outcomes achieved
- Develop your **Personal Business Success**
- Define deliverables and milestones; develop a **plan** and implement it
- **Education** on business issues
- **Support** and coaching throughout the process

How you and your business will benefit

Streamlined access to expert advice

Having expert advisors means that you can access best-of-breed information on the following areas:

- Accounting
- Marketing
- Human Resources
- Information Technology
- QA
- OHS/WHS
- Venture Capital
- Bank Financing
- Mergers & Acquisitions
- Legal
- Risk Management & Insurance
- Business Coaching & Training
- Developing an Organisational Capabilities Framework

DID YOU KNOW?

This Advisory Board credibility may help you to:

- Gain finance from banks or venture capital
- Win new contracts with large companies
- Impress distributors or overseas contacts

Business benefits

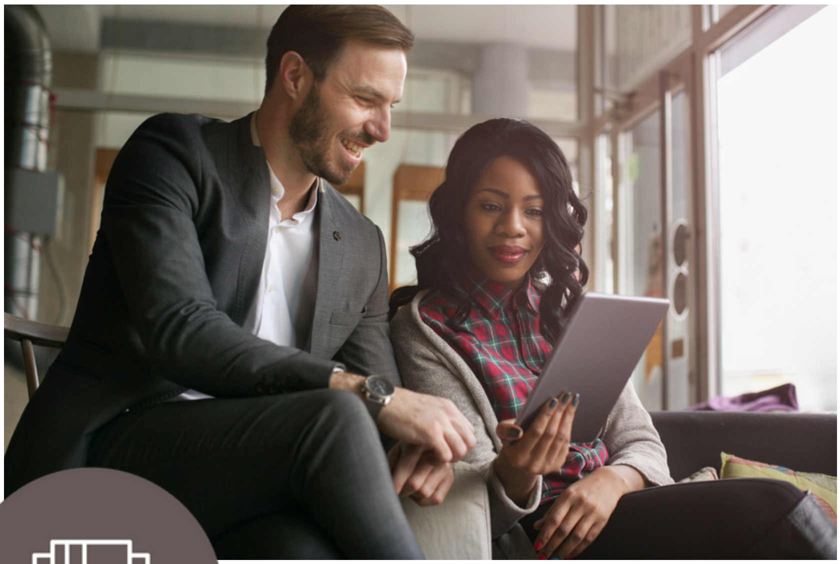
The Client Advisory Board will provide you with a platform to brainstorm and workshop issues. You will develop confidence about your decision-making skills, knowing you are supported by your professional team of advisors.

An Advisory Board will help you create a profitable, thriving & valuable business by:

- Enabling you to 'step outside' your business and look at the big picture
- Implementing accountability and making sure you are prioritising and making good decisions
- Providing a group of people to provide 'Wise Council'
- Offering a 3rd party independent view that helps to focus on the important issues
- Providing access to knowledge and expertise on how to implement systems to avoid tail-chasing
- Creating a Stop-Check – ie. Providing a justification to employees, suppliers and customers on why decisions aren't rushed and made instantly - ie. "I have to ask my advisory board, I will get back to you."
- Enabling the development of a continual improvement framework and enhancing the business' reputation

Key elements of a MAUS certified Advisory Board:

- The Advisory Board meets on a regular basis to discuss your business.
- There will be a set agenda and process.
- The Board discusses results from the previous month and then what is needed to be done over the next timeframe.
- The Advisory Board will brainstorm on strategic high level issues as well as keeping the business accountable on a day to day basis.
- Gain immediate feedback on proposals, business development, HR and other services.
- Create accountability focus, structure and access to immediate systems & processes.
- The Board gives you the benefits and expertise of a high level employee operation with a low budget. You simply decide the size and nature of the board.
- It draws on the skill & knowledge of advisors that have the practical experience.



MAUS CERTIFIED ADVISOR

ADVISORY BOARD FRAMEWORK

7 step pathway to business success

STEP 1 - High Level Goals & Strategy
Do you know where your business is now and what you wish to achieve over the next 3 years? (Tip: Include business/exit/personal goals. What are your high-level strategies?)

STEP 2 - Success Factors - Strategic Goals
Do you review the success factors of the business and translate these into strategic goals? (Tip: Start with your customer success factors and then review the other areas.)

STEP 3 - Strategies, Actions & Milestones
Have you reviewed each of the strategic goals in the previous section and thought through what you need to do to achieve this goal? (Tip: Create 90-day action plans and key milestones with dates and accountability.)

STEP 4 - Monthly Business Review
Do you track the results of your business each month? This should include a review of your business financial performance and your strategy. (Tip: Adapt your Business Plan to changing circumstances.)

STEP 5 - Systems & Workflow
Can you 'tidy-up your business' and develop the systems and workflow to help execute strategies that ensure your business is not totally reliant upon the owners?

STEP 6 - Employee Engagement
Do you align your employee goals and targets with the company and then set in play a system to motivate and engage employees through consistent communication and accountability systems?

STEP 7 - Culture Change & Sustainabililty
Do you ensure the long-term success of your business through continual top-level support and continual reinforcement of the system?

An overview:

- Pretium Solutions will coordinate the development of the **your business success plan**
- Pretium Solutions will convene and facilitate **regular meetings** for you and the Advisory Board to report on the planning and implementation of the business' strategic plan
- This would include **guidance on appropriate actions** required to achieve best possible outcomes

Get started now - guaranteed results!

Pretium Solutions will set up an obligation free meeting to discuss your business and what the Client Advisory Board can do for you.

What happens after I sign up?

The process is customised to fit your business and personal needs. This generally involves:

1. Preliminary discussions to address **key prominent issues** that need immediate attention.
2. **Diagnostic and audit** of your business to identify key weaknesses and gaps.
3. The establishment of a **7 Step Business Success Program** to move your business forward.
4. Advisory Board **meetings** on a monthly or quarterly basis to project manage and grow your business.

MEET THE BOARD


Paul Sweeney


Jim Mills


Bruce Gleeson


Jason Smith


Raj Nathoo


Harry Nathoo


Rita Morar


Luke Iacovelli


Dave Ferris


Sandra Zalud


Paul Cripps


James Frank


Claire Wendell

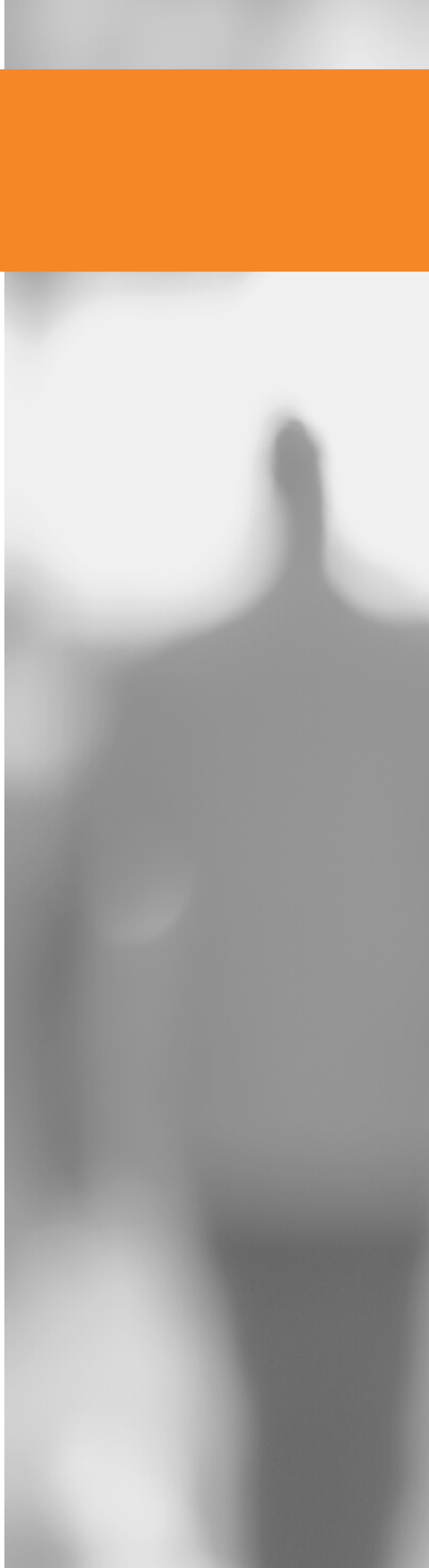
Coming up:

Learn more about the experience and service areas of the board members...

Areas of Service

	Paul Sweeney	Jim Mills	Bruce Gleeson	Jason Smith	Harry / Raj / Rita
Estate Planning					
Sales & Marketing					Sales
Information Technology					
Wealth Creation					
Exit Planning					
Business Start-Up					
Business Restructures					
Finance					
Human Resources					
Managerial Skills					
Insurance & Risk Management		Key Person Insurance			
Strategic Planning & Implementation					
Legal					
Processes					
Accounting & Taxation					
Business Advisory & Coaching					
Organisational Capabilities Framework					

Luke Iacovelli	Dave Ferris	Sandra Zalud	Paul Cripps	James Frank	Claire Wendell
					Marketing
				Legal structuring of securitisation	
				Corporate Commercial Employment	



Learn more about your advisors

Paul Sweeney

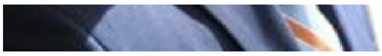
Managing Director Paul Sweeney launched Pretium Solutions after a long and successful career in accounting and business advisory. Paul credits his passion for small business with growing up in country NSW, where family-run businesses were the cornerstone of everyday life. For Paul, the driving force behind the creation of Pretium Solutions was to make high-end, proactive, directed and value-based advisory services available to small to medium businesses. Paul brings to the table decades of experience as a highly qualified accountant and business advisor at every level of business. Through consulting, coaching and on-the-ground training and operations, his focus is on unlocking the untapped potential for greater profitability. Paul's qualifications allow him to pair strategic advice with an advanced understanding of taxation and compliance matters.

Jim Mills is the Principle Advisor and Managing Director of Merit Planning Hills Pty Ltd, established in 2008. The Merit Planning team are financial strategy and wealth advisors, with a focus on working with small to medium business owners. They are passionate about ensuring Australian business owners see the benefit of their hard work in the form of significant personal wealth accumulation. In this ever changing economic and legislative landscape it is important to have a partner with a focus on active strategies that align with your strategic goals - both from a business and personal perspective.

Jim Mills

Jim is well known across the financial service industry with over 25 years experience, previously holding executive positions in large financial institutions. He is backed by a team of qualified advisors and outstanding service personnel focussed on seeing Australian businesses thrive. Jim holds a Bachelor of Business, Diploma of Financial Planning - RG146, Stock Broking, Estate Planning, SMSF specialist & Tax Financial Planning qualified.

Bruce Gleeson



Bruce Gleeson is a Director and Owner in Jones Partners, a Firm that provides tailored solutions to companies (particularly small to medium enterprises) and individuals in financial difficulty or that require restructuring assistance, exit planning advice or general strategic advice.

He has in excess of twenty (25) years in corporate insolvency, restructuring, exit planning and bankruptcy experience. Bruce has also held roles in commerce with several Top 100 Companies (James Hardie and AMP) to further add to his professional skills in areas such as compliance and project management.

Bruce is a Registered Liquidator, Registered Trustee in Bankruptcy and a Justice of the Peace (NSW).

Jason Smith has a passion for business, which started for him in 1996 when he bought his first business, a real estate franchise with a business partner. After selling the business in 2007 Jason started a Debtor Finance company in 2008 (CashFlow Advantage) and discovered his love of finance and assisting small business owners with their cash flow. In March 2018, Jason started Capital Plus Finance, a commercial finance broking company and he is back doing what he loves most, helping small businesses succeed by making sure they get the very best finance deal available and offering a great customer experience.

Jason Smith

Learn more about your advisors... continued

Raj Nathoo

Harry Nathoo

Rita Morar

As Certified Business Coaches under Brian Tracy's FocalPoint Coaching and Training, Raj and Harry Nathoo and Rita Morar, collectively bring over 76 years of business experience, in both the entrepreneurial and corporate environment. They have extensive experience in business growth and performance and the learning and development space and have helped turn businesses around and help grow businesses from inception. As a team, they focus on working with business owners to help them strategise for growth, using proven methodologies that have helped thousands of other businesses all over the world.

As an entrepreneur, Raj understands the stresses and indecisions that entrepreneurs face in the desire to grow their business and deliver a positive return on their investment. Raj's accounting background, coupled with practical know-how, has helped him to identify key constraints in small businesses and advise clients on the best possible methods of overcoming challenges.

Harry has a proven track record of success in sales and marketing, strategic partnerships and business planning and start-ups. Harry has worked closely with top ASX companies, SME's, NFP's and within the Public sector. Through his legal background, Harry has the expertise to advise clients and draws from a wide range of solid business skills to assist him in guiding his clients to build a road map to higher levels of personal achievement and business growth.

Rita is a Relationships Manager and Trainer. She passionately works with individuals and micro-businesses in helping them implement proven practical strategies and methodologies that helps them grow personally and professionally. In her previous role at Commonwealth Bank over the past 10 years, Rita mentored and coached Retail Banking staff on customer service skills, sales and compliance.

Luke Iacovelli

Luke Iacovelli is the Sales Manager for UNITECH Solutions. He is responsible for a team of sales personnel and helps drive corporate selling of technology solutions to suit the many different clients under his portfolio. Working within the technology industry also requires constant training & personal development across the many changes faced within this sector. Luke has industry qualifications from key vendors such as Microsoft, HP, VMware & Citrix (just to name a few). He prides himself on keeping up-to-date with the latest technologies, so that he is able to communicate these solutions to his clients. As the Sales Manager, Luke works closely with his Sales Team on ensuring they convey quality product knowledge and the delivery of efficient, cost effective Smart Solutions for their wide range of clients.

Dave Ferris is the Senior Client Broker & Division Head (Enterprise Division) at DavelCorp Insurance Brokers. He has diverse insurance industry experience spanning over 35 years, that has included roles in Risk Management, General Insurance underwriting, Facultative reinsurance, Underwriting Agency Management and Insurance Broking.

Dave's qualifications and experience well equip him to add significant value to our clients as a risk consulting insurance broker with a proven track record in tailoring unique risk transfer solutions for larger clients, groups and associations.

Dave Ferris

Learn more about your advisors... continued

Sandra Zalud

Sandra Zalud has been a representative of Liberty Network Services for over 5 years and has over 25 years of banking & finance experience. Sandra has a passion for creating finance solutions for her clients and ensuring those solutions align with her clients' goals & financial circumstances. She prides herself on offering exceptional customer service. As a Liberty Advisor, Sandra offers diverse lending ranging from Commercial Finance, Self-Managed Super Funds, Residential Mortgages, Business and Personal Loans, Car Finance with Liberty and a panel of lenders. After hours, Sandra enjoys spending time with family and going out to restaurants, dancing and meeting new people at networking events.

Paul Cripps, founder of PK People Solutions, provides operational and strategic HR solutions in collaboration with business leaders and key stakeholders. He helps businesses to align the activity of their workforce to the business strategy to improve performance and profitability.

Paul is a licensed member of the HR Coach Network – the largest independent HR Coaching Network in Australia. His HR corporate career has spanned over 20 years (in Australia and the UK) for QBE Insurance, GE, Allianz, Willis Towers Watson and BNY Mellon.

Paul Cripps

James Frank

James Frank, Chief Executive Partner at Frank Law, is an experienced and innovative Corporate Lawyer dealing primarily in Governance, Advisory, Restructuring and Litigation matters. He is also an accredited Australian Restructuring, Insolvency and Turnaround Association (ARITA) Expert member.

James has a passion for innovation and technology, and is experienced in building and scaling start-ups.

Claire Wendell founded Click Click Media in 2008. She felt there was a great need for a personalised service that offered education and support to businesses in the online marketing field.

In recent years, Click Click Media has evolved to provide complete digital solutions to compete in a fast-paced digital world. They combine software engineers, business architects and marketing experts to create next level and innovative solutions for their clients' changing needs.

Claire Wendell

The MAUS difference:

MAUS continually develops innovative but practical based business solutions.

MAUS is an established worldwide publisher of software and management systems with a global network of business advisors that primarily help small to medium sized businesses.

MAUS Certified Advisory Board partners have access to the complete array of MAUS software and management systems that have been shipped to over 60,000 companies and over 10,000 advisors in over 55 countries around the world.

MAUS Certified Consultants are independent business advisors and legal entities that operate independently but have undergone an intensive training program in the MAUS methodologies and systems.

Award-Winning Cloud-Based Software for Small Business

You'll have peace of mind that it has been developed by one of the world's leading software and consultancy publishers.

MAUS Cloud software includes an 'all-in-one' suite of cloud-based business apps which can be fully customised to be unique to your individual business. With full scalability, you can react to the market with the click of a button:

- Over 60,000 customers of MAUS software
- Over 20 years of experience
- Fully scalable system, add employees overnight
- Award-winning cloud platform
- Full technical support
- Backed by a worldwide group of consultants

We look forward to working with you...

Pretium Solutions is a proud member of the internationally recognised **Institute of Advisors**. Paul Sweeney (Pretium Solutions' Managing Director) is the Northwest Chapter President. The Institute aims to empower professional Business Advisors, consultants and coaches around the world through education and setting the professional benchmarks & standards across the business advisory profession.

Pretium Solutions®

Institute of Advisors
Est. 2009
Certified Business Advisor

MAUS
CERTIFIED
ADVISOR

For the inside scoop on what is happening in the Advisory Board, check out our podcast series...

the business behind your business

Our podcast series offers an exclusive behind-the-scenes look at the Client Advisory Board. Get the back story on the team, learn business tips from the experts, plus much more.

Episodes feature everything from start-up success stories, to interviews with industry experts and deep dives into all of the problems (and solutions) faced by small and medium business owners.

Download episodes today from your favourite podcast app or from our website.

www.thebusinessbehindyourbusiness.com

Conversations to help your business grow & thrive

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