

NAVIGATING BUSINESS GROWTH INSIGHTS FROM SUCCESSFUL FIRMS

CENTREPOINT
ALLIANCE





SANDY HOPPS

- **Established in 2008 after Sandy returned from Sydney to Toowoomba, joining a local risk practice as an adviser and purchased the business from the principal when he retired. Strategic Planners has grown organically along with a book purchase in 2021**
- **With approximately \$900k in revenue offering holistic advice including insurance**
- **1 Adviser, 1 Paraplanner, 2 Client Service, 1 VA**
- **Acquisitions**
2008 - Insurance book, \$120k in trailing commission, purchased at 3 times revenue
2021 - Insurance book, \$100k in trailing commission, purchased at 1.6 times revenue

📍 Toowoomba

📍 Dalby

📍 Ballina

📍 Perth

📍 Bundaberg

📍 Mackay

📍 Murwillumbah

📍 Townsville



- **Originally founded by Peter and Jenny Lever. Grown through various acquisitions of accounting books from the outset. M&A activity ramped up with the purchase of equity in Ballina accounting practice in 2016. Subsequently have made further acquisitions - accounting, lending and advice**
- **With approximately \$8 million in revenue offering integrated financial services business - business advisory, tax, SMSF administration financial advice, retail and commercial lending**
- **4 Directors, 15 Accountants, 23 Accounting support staff, 2 Financial Planners, 2 Paraplanners, 2 FP Admin. Assistants, 1 Mortgage Broker, 1 Broker Admin**
- **Acquisitions**
 - Pre 2016 - small accounting books**
 - 2016 - Ballina Accounting Business (partnership model)**
 - 2021 - Mortgage broking book**
 - 2023 - Accounting business, Bookkeeping business, Financial planning book**



ALISHA LEVER

📍 **Paddington**

📍 **Maroochydore**

📍 **Redcliffe**

📍 **Innisfail**

📍 **Cairns**



SIMON COOMBES

- **Simon originally bought business from mortgage broker (Astute), then grew organically via relationships with mortgage brokers and accountants. Started acquiring books and businesses in 2020**
- **With approximately \$13.5 million in revenue offering holistic financial advice**
- **1 General Manager, 14 Financial Planners (includes Simon and Joel), 5 Paraplanners, 17 Support staff**
- **Acquisitions
28 businesses or book buys acquired since 2017**

📍 **Paddington**

📍 **Maroochydore**

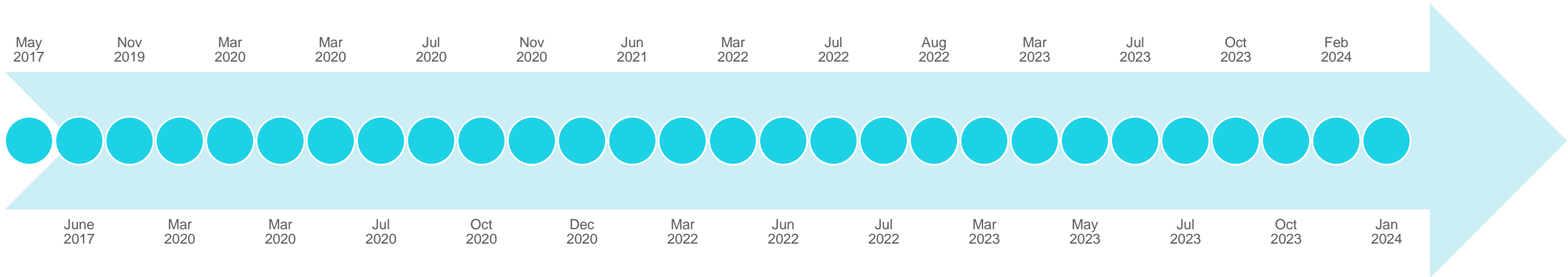
📍 **Redcliffe**

📍 **Innisfail**

📍 **Cairns**



ACQUISTIONS



June
2017

Mar
2020

Mar
2020

Jul
2020

Oct
2020

Dec
2020

Mar
2022

Jun
2022

Jul
2022

Mar
2023

May
2023

Jul
2023

Oct
2023

Jan
2024

THANK YOU

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