

# Attracting, retaining and training

*Creating a great workplace culture*

**Chris Cachia**  
**Dee Goesch**  
**Matthew Cummins**



**DIRECTORS:**  
**Ian Reid (Principal)**  
**and Dee Goesch**



**A & b**  
**FINANCIAL PLANNING**  
**Temora NSW**



**A&b** FINANCIAL PLANNING

**CENTREPOINT**  
ALLIANCE

## about us...



**350 client groups (engaged)**



**No more Key Person Risk**



**Difficulty finding staff = Grew our own Adviser / Professional Year program**



**Difficulty Retain staff = Full remote working CSO/Paraplanner**



**Outsourced SOA's paraplanner. com to cope with staff changes**



**CSO's Adv. Diploma Paraplanning to upskill, engage staff & bring paraplanning back**



**CSO training Cert III Mortgage Broking / Future potential**

**3 Advisers**



**You get the whole team approach, clients meet all staff**

**8 Staff**

**Business Growth Areas:** Lending / New Regional locale (Forbes) / Aged Care

**New business:** Mostly organic from client referrals, Google search / & walk-ins (Avg. 2 new business/week)

**BALI**  
2024 ANNUAL PARTNER SUMMIT



# What we do differently:

- ◆ **Multi-skilling our staff: Reception / FDS/Opt-in work, Off-site CSO all Centrelink / Corporate Actions**
- ◆ **CSO's do modelling, write ROA's and do all implementation work (bringing back Paraplanning will create a seamless client experience)**
- ◆ **Own advertising**

# Family Friendly



- ◆ **Flexible work hours / family needs / spending time together / drop-ins / inclusivity / Public Friday Joke board**

# Community Spirit...



# BUSINESS STRUCTURE

## Centrepoint Alliance

(Alliance Wealth)

ASX Listed

Financial Services License holder



## Centrepoint Alliance

- Independent research house
- Provides compliance/audit services
- In-house technical services team

## Millennium Wealth

5 Partners

14 Staff



## Millennium Wealth

- 4 independent businesses
- Shared resources & ideas to improve efficiency and client experience
- Monthly investment round table
- Almost \$1 billion in funds under management

## MC Advice Pty Ltd

Authorised representative of A/W

Mathew Cummins – Director/Executive  
Financial Adviser

Hugh Lovibond – Director/Executive  
Financial Adviser

Chloe Lopez – Business Manager



## MC Advice Pty Ltd

- Immediate team working along-side clients to meet their goals.
- Individual client groups held at this level to improve privacy.
- \$250 million in funds under management



# MEET THE TEAM

## Matthew Cummins

Partner & Executive Financial  
Planner



M: 0451 167 356

E: matt@millenniumwealth.com.au

BBus Com, CFP

15 years industry experience

## Hugh Lovibond

Partner & Executive Financial  
Planner



M: 0423 368 002

E: hugh@millenniumwealth.com.au

BEc, Bcom, ADFP

12 years industry experience

## Chloe Lopez

Business Manager



M: 0450 801 860

E: chloe@millenniumwealth.com.au

BComFP, ADFP

8 years industry experience



**Business Location – Docklands, VIC**

**Advice Type – Holistic Fee for Service**

**Client Type – We work with clients from various stages of life**

**Number of staff – 7 in the Melbourne Team and 4 Overseas**

**We manage over \$220 million in funds under management**

**Highly efficient and process driven**



**CCA culture is what makes us successful.**

**In our culture, we celebrate and embrace our diversity and each person's individuality. We want people to express their personality in their work by working to their strengths.**

**One of the advantages of promoting being the best you can be, is that it encourages people to think outside the box and be more innovative.**

**When you combine fun at work, it ends up being in the best interest for everyone- employees are more engaged in the work that they do, and the company as a whole becomes more innovative.**



dream ...  
plan ....  
do.....

# CCA CUP

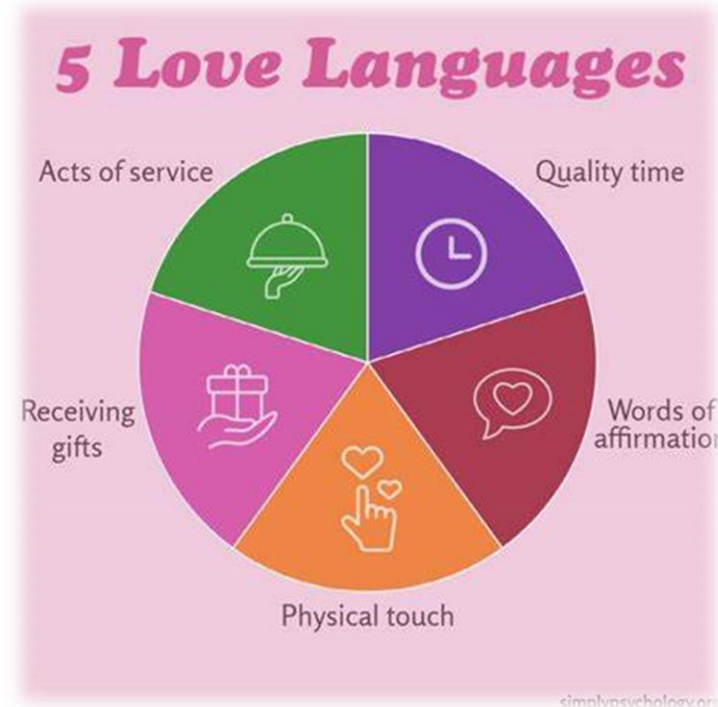
OFF AND RACING



SPRING RACING CARNIVAL

**CENTREPOINT**  
ALLIANCE

Do you have a  
best friend at  
work ?



# QUESTIONS ?

