

SYA Future Leaders Start Up Boot Camp 2016 _ MY STORY

I attended the SYA Start Up Bootcamp last year as I was about to embark on a new journey in building up a financial planning firm and to venture into building a whole new service that will change the landscape of financial advice in Australia

The 72 hours spent with Ash Singh and Sundeep Singh highlighted to me the key points required to execute the ideas, building my confidence around the project as well as introducing a whole new dimension of thought processing and development.

After the program, I returned a different person. I was more focused and driven to give my dreams and aspirations a go. Since then, I had left my job with AMP and joined my older dealer group, Madison Financial group and build my financial planning business from zero.

I had developed a business plan that helped me gather funds from investors who trusted in the idea I had – which was to create a ground breaking financial planning firm in Sydney and expand it nationwide in next 2 years before going international with the platform ideas. I introduced various different tools in collaboration with researchers and planners from Washington and Uni of Sydney that helped clients identifying their true needs and values in life – slowly the firm started moving from just a plain ordinary financial planning firm to one that was becoming more of a ‘life planning’ firm that focuses on making your finances less complicated as life is often way more complicated

I then rebranded and repositioned myself especially within my target group and started writing various articles in the print media around finances and emotions – and kept building my brand image around it. Months of hard work went into building the whole idea that eventually led to the us firmly adapting to our goals, objectives and methodology. Now, we are building a new platform that facilitates the advice process all online through an app with the banks and major stockbrokers.

Before attending the camp, I was clueless as to what I can and should do and what I am capable of. The camp highlighted to me what I can do and brought out the desire for me to make this work. The content and the knowledge from the camp made it all possible. I owe a lot of my success so far and all my knowledge and attitude towards the business to the SYA Boot Camp – it is the best learning ground anyone could ask for.

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