

MONEY MATTERS

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Kearney Group Adviser Named Securitor's Financial Planner of the Year

The Kearney Group is pleased to announce that Kearney Financial Planning has again been awarded top honours by its licensee, Securitor.

In addition to being recognised as Securitor's *Practice of the Year* in 2008, the firm was thrilled by today's announcement that Principal Paul Kearney has been named *Advisor of the Year* (Victoria) for 2010.

"Recognition like this is an honour for our whole firm," said Kearney. "It is a credit to our entire team, our philosophy, our processes and skill that we were considered for this award, much less the winners."

Upon being selected from a pool of Victoria's top advisers and eligible firms, Mr. Kearney noted that such awards help to validate the Kearney Group's non-traditional approach to professional financial services. With a corporate philosophy that insists upon the provision of holistic and individually tailored client-centred care, one can easily see how the Kearney Group's mission flies in the face of traditional 'form-letter' financial institutions.

"We know that we haven't sacrificed the quality or quantity of our work by approaching financial services differently," says Kearney, "but receiving this kind of external validation is very motivating."

To be considered for the *Adviser of the Year* award, the firm and adviser were evaluated against some fairly stiff criteria. The winner was required to demonstrate:

- The provision of top quality advice
- "A Grade" Compliance to licensee's standards
- Top quality comprehensive Statements of Advice (SOAs)
- Advocacy within and for the Securitor group
- Diversity of income streams
- Commitment to practice development
- Outstanding outcomes from advice

In the wake of the Global Financial Crisis, while many businesses posted significant losses, the Kearney Group continued to grow. Drawing on their most current performance data, Mr. Kearney has stated that the firm is exceeding this year's targets and will "comfortably [achieve its] best results ever, in this financial year."

The firm's success is due, in part, to the diversity of its income streams which include a holistic offering of financial planning, investment, risk management, debt finance, accounting, taxation and business advice services. Its performance, however, is also indicative of the comprehensive and high quality advice that has become synonymous with the Kearney Financial Planning name.

In the last year, the Kearney Group has also taken on numerous practice development projects. The firm has invested significant effort into the design and implementation of their new budgeting model, data capture and internal KPI reporting systems. Additionally, solidification of the firm's corporate mission, vision and values has helped to reinforce the Kearney Group's strategic direction for both its staff and clients. The unveiling of the firm's new website in September 2009 and the ongoing redevelopment of marketing and corporate materials has launched the Kearney Group into a new phase of life.

All of these major projects have indicated the Kearney Group's ongoing commitment to practice development and have been achieved while the firm maintains an "A Grade" Compliance Rating.

Paul Kearney is in his fourth year as a member of the Securitor Circle, a professional development and advisory committee composed of the state's top 10 advisers.

As *Adviser of the Year* for the state of Victoria, Mr. Kearney is now in consideration for the national award. The *National Adviser of the Year* will be announced at the Securitor Convention in Adelaide next month.



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