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THE MARKET PLACE FOR SELLING YOUR FINANCIAL PLANNING BUSINESS

Wayne has over 20 years experience in the financial services industry, starting his career when he established his own financial planning business. After selling his client book he began a corporate career in wealth management.

Wayne's commercial experience includes General Manager of Dealer services, General Manager of platform management and Executive Officer for the trustee company of a major banking group. Part of Wayne's recent responsibilities include business growth, consulting and succession services to advice businesses and the management of the sale of client books within and between licencees. The latter entailed managing sellers through a client acquisition and transition process to a buyer.

This experience provided practical knowledge and awareness of what drives effective interaction between small businesses and institutions.

Wayne has lead corporate strategy and significant business investment programs, including wealth management acquisition and divestment assignments, in Australia, the UK and South-East Asia. He also has extensive governance experience.