



# APAC Regional Conference 2025

Collaborate to Create: The Power  
of Strategic Alliances





# Perks – A Growth Story

James Black, Director & CEO

# About Us

- Adelaide, South Australia
- 30 Directors, 220 team members (inc. 40 Manila)
- Multidisciplinary professional services firm
  - Accounting
  - Wealth
  - Finance
  - Insurance
  - HR Consulting & Recruitment

# Our Focus

- Private client – private business owners, HNW families
- *“We are the trusted partner of business owners, families and individuals, guiding them through every stage of their financial journey”*
- Long term, multi generational relationships

# Our challenges – pre COVID

The Discussions we were having at LEA ANZ forums were around;

- The war for talent – Au and Ph
  - Talent attraction & retention
  - Managing capacity
- Balance between graduates & outsourcing
- Quality & consistency
- Client mix
  - Unprofitable v profitable
  - Ideal client
- Pricing / quoting / billing discipline

# Our Opportunity

- Our realization in 2018 / 2019
  - The industry was lean or short on capacity
  - Our competitors could not service existing clients let alone take on new clients
- Submitted my details, posing as a potential client with 7 competitor firms... only 1 responded (after 6 weeks)

# Our Growth Strategy

- Organic growth plus “tuck-in acquisitions”
  - Focused on what we do well, try to do it better
  - Heavy investment in team, talent acquisition & retention
  - Most importantly... continuous 5-year planning
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- You must plan for growth, can't just expect it to happen

# Organic Growth

- Brand position –
  - Support SA economy
  - Ultra local... sponsor local sporting clubs / charities
- Client experience –
  - Same day response to any new enquiries
  - Strong client entertainment & gifting program
  - Drives client referrals
- Marketing –
  - Content, thought leadership, SEO, google, social media



# Organic Growth

- Invested heavily in our people –
  - Pay upper quartile
  - Strong & consistent graduate intake
  - Defined graduate program
  - Accelerated career path – grad to AM in 3 years
  - Technical, leadership development, soft skills, well being
  - LEA: international secondments, ANZ emerging leaders
- We are the “go to” firm for young professionals looking for a strong & successful career in South Australia

# Organic Growth

- Every Director must;
  - Have a continuous 5 year plan in place
  - Have a marketing & business development strategy
- Succession;
  - Don't ignore it
  - Agree the succession plan 3-5 years out
  - Agree the remuneration
- Plan the talent pipeline
  - 5 Directors in succession, 12 on the pathway to Director

# Acquisition Growth

- “Tuck-in” acquisitions
  - \$1m-1.5m in fees
  - Typically 1 x Director with strong Manager
  - Client base needs to be similar
  - Charge out rates, billing discipline need to be similar
  - Need to be a strong cultural fit

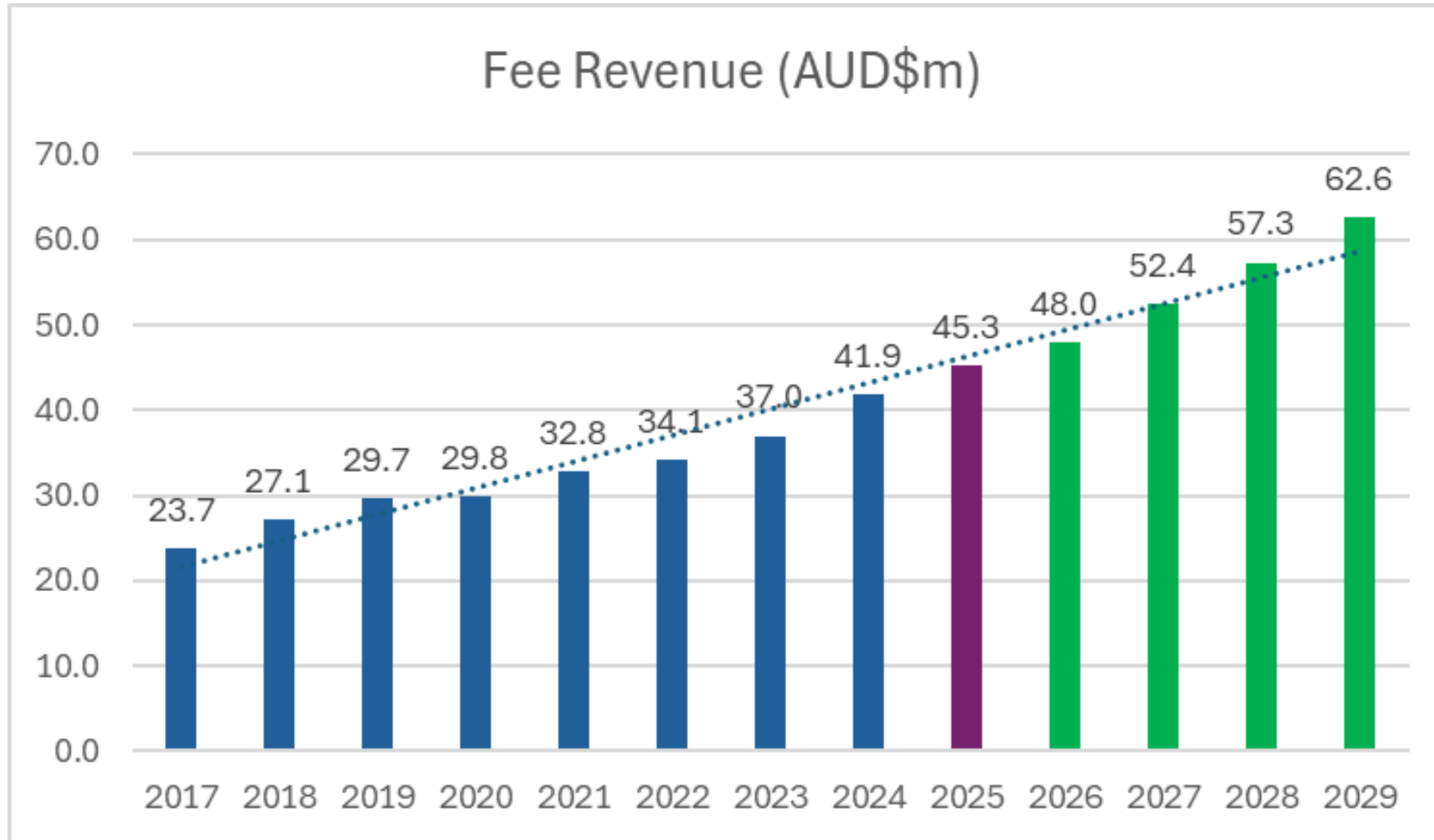
# Our secret

- Invested in our people ahead of the fee growth
  - Held excess capacity and we filled it
- Goodwill model, group ownership
  - dividend yield plus capital growth
- Robust director remuneration model
  - Performance based, with some flexibility
- Succession
  - Plan, agree, communicate... remove the anxiety

# Our Growth Story

- Consistent profitable growth
- Fee Revenue
  - Actual 9% YoY growth for last 10 years
  - Forecast 9% YoY growth next 5 years
- Improved GP% and EBIT% as we continue to scale

# Our Growth Story



# Q & A

Any Questions?