

Professional client service & advice requires planning practices to grow...standing still not an option says Zervides

Tuesday July 11, 2017. Melbourne based financial planning practice Australian Wealth Solutions (AWS) founder and principal Sam Zervides has just completed the move to larger modern premises. It is the first step in an ambitious strategy that will position the advice business for growth needed to address the future needs of clients and alliance partners.

Commenting further, Sam Zervides said “Advice businesses that genuinely want to be relevant in providing financial solutions for their clients in the post FoFA LIF era simply can’t stand still and expect to thrive let alone survive – those days are gone!”

“The challenge of staying relevant to current and future needs of clients requires an entrepreneurial mindset and investment – however, although growth is our goal, it will be managed carefully to ensure new planners and staff are a cultural fit within the business and share the same values of providing exemplary service and advice”.

Established in 2004, AWS has always focussed on reflecting Sam Zervides values of being a boutique financial planning firm committed to providing the highest levels personalised financial planning solutions and service to businesses and individuals.

“Most importantly, we have never lost sight of our commitment to these core values as they are our columns of strength – and together with our highly regarded presence and reputation in the local south eastern suburban community – has resulted in a steady stream of client and alliance / partner enquiries to our Caulfield based office”, said Sam Zervides.

“But when looking to the future, it’s no secret that it will be far more challenging and complex for individuals and business owners seeking a solution to their needs from an overwhelming and bewildering array of financial service products and offerings.

“As a result, professional advice will be more important than ever to find the best solution required to address self-employed, commercial, superannuation, wealth creation, insurance protection and retirement needs and goals”.

“Hence the need for new larger premises and focus on planner strength and support staff growth to ensure AWS stays ‘*ahead of the curve*’ in order to provide the most appropriate financial outcomes for our clients”.

Sam Zervides also confirmed that AWS would utilise the latest developments in technology and administrative processes in order to free up the time of staff for more client-facing / client value added activities and services.

Mutually beneficial relationships and alliances with local real estate agents, lawyers and accountants have also been a strength for AWS and will continue to be a priority said Sam Zervides.

“It is impossible for professional service organisations to be all things to all people”, affirmed Sam Zervides.

“Therefore, service providers will need to specialise in their respective areas of expertise and utilise local networks and alliances with trusted specialists that have the welfare of the client as the central priority”.

“With such a strong local community presence and reputation as a leading financial advice practitioner, I’m confident AWS will be the preferred financial advice partner for more and more accounting, legal and real estate businesses”.

Sam Zervides has confirmed that he will be announcing the appointment of a new financial planner next month as the AWS growth strategy gains momentum.

Note: The new address of Australian Wealth Solutions is
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Notes to the Editor: **About Sam Zervides BA, DFA, AFA**



Sam Zervides is the founder and principal of Australian Wealth Solutions (AWS). After extensive experience in corporate management and financial planning, Sam chose to leave a senior financial planning position at Westpac to pursue his own business venture.

Sam completed a Bachelor of Arts at RMIT University in 1988, and then undertook a Diploma of Financial Advising with the Securities Institute of Australia in 2004