



Media Release

InterPrac accolades and success underpinned by internal culture of service & staying relevant to advisers

Wednesday November 9, 2016. Melbourne based MD Financial Planning P/L principal Mary De Angelis and Sydney headquartered Capitaleyes Financial Planning P/L principal Charbel Fahd are not surprised InterPrac Financial Planning (InterPrac) will end 2016 with accolades for the highest level of adviser satisfaction and achievement of business and adviser growth milestones.

Recently, InterPrac took first place for the second consecutive year in the Investor Daily annual dealer group satisfaction survey and jumped from 38th position to 28th in this year's Money Management's Top 100 Dealer Group Survey.

"Winning the dealer group satisfaction survey for 2015 and 2016 has been especially pleasing as it is a reflection of InterPrac's non-aligned and accountant centric model that regards the relationship with both our adviser network and the National Tax and Accountants' Association (NTAA) as a professional collaborative partnership", said InterPrac Managing Director Garry Crole.

"Most importantly, we manage growth very carefully and all new entrants must be a cultural fit within InterPrac".

InterPrac National Practice Manager Michael Gershkov says advisers who make the switch to InterPrac regard flexibility and choice as the key prerequisites to delivering advice free of external influences.

"A flat operational structure that facilitates easy access to the executive team, together with an offering that can be personalised to the needs of each individual practice underpins our value proposition", said Michael Gershkov.

MD Financial Planning has been growing steadily since Mary De Angelis started the business in 2012. Mary then joined InterPrac and today the practice comprises of 4 advisers and 2 support staff specialising in aged care services.

"I am especially proud that MD Financial Planning's growth has been organic and for the high level of service, care and attention we provide to clients", said Mary De Angelis. "InterPrac has certainly played a major role in supporting our endeavours as a business partner.

"Although very satisfied with MD Financial Planning's success to date, there is still potential for further growth and I'm confident InterPrac will support these aspirations with services as the practice grows and evolves in response to the changing needs of clients".

While a veteran in terms of his history as an accountant, financial planner and principal of Capitaley Financial Planning, Charbel Fahd is far from slowing down with work currently underway to enlarge the office to accommodate future growth and business expansion.

Primarily servicing the needs of SMEs and HNWI's, Charbel prides himself on client service that is personalised and professional as well as the longevity of relationships with clients.

“InterPrac is a very unique community of advice practitioners led by a team of industry professionals committed to sustainable long term growth”, said Charbel Fahd. “Capitaleyes has benefitted immensely since joining InterPrac and the future can only realize further mutually beneficial outcomes”.

Although very satisfied with InterPrac’s numeric successes to date (200 advisers and top 20 dealer group nationally), Garry Crole acknowledges that the modern dealer group has to stay ahead of the curve by providing advisers with best practice options, high level of communication and service that supports their individual business needs – the days of one size fits all offerings are gone.

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