

2021 Team Update



David Andrew

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We will remember 2021 as a year of extraordinary growth, both as a business and for individual team members. We are blessed by having wonderful clients and a fantastic team and there are many achievements worthy of note and celebration.

It was the best of times; it was the best of times! (apologies to Charles Dickens)

It has been a surreal year as we dodged the worst of the Covid challenge, while we continue to grow our team and our capabilities. It seems strange that amid such turmoil, many businesses are thriving.

One of our biggest achievements for the year was Chris King's retirement. As co-founder we marked the end of a career in financial advice that saw him become one of the best advisers in Australia. Chris was sought out by business owners for his pragmatic clear thinking for which he is renowned. Thankfully, he has decided to continue working with us as an [Elder of the Firm](#).

Chris' retirement also helped us progress our succession plans which are now well advanced. Across the business we have ten shareholders, with Gen2 owning almost 40 percent of the business. We have also begun implementing a transition of the day-to-day leadership and management of the firm. Our executive group now owns the operational leadership and there is a planned transition under way. We believe we are very well placed to achieve our vision of becoming a multi-generational business.

While we will never pursue growth for the sake of growth, we continually grow because our services are in demand. We are very grateful to be regularly introduced to new opportunities by our professional associates and our existing clients. This year we have welcomed 50 new family groups into the Capital Partners family, and we are delighted that they have chosen us as their wealth management partner.



50 new clients



1 new principal



5 new babies



2 award winners



10 new
team members



3 built or bought their
first home

[/vc_column_text][vc_column_text]Each year we recognise those who have achieved significant service with Rakesh Shah reaching 15 years, and Damon Sugden and Sophorn Hak both achieving 10 years of service. We deeply value the commitment our team makes, and we love celebrating these milestones.

Finally, we acknowledge Kathryn Creasy who was honoured by the Financial Planning Association as the *Certified Financial Planner Professional of the Year* for 2021. This is a remarkable achievement, selected by her peers, on merit, from the 19,000 financial advisers in Australia.

Highlight Reel

- Damon Sugden became our newest Principal, a significant step as an owner and leader in the business.
- We welcomed Nicole Chiam as our new head of finance and talent, which is such an important role as we continue to grow our team.

- We had several new babies arrive with Olga and Craig welcoming Snejana; Anna and Blair welcomed Emilia; Farah and Brett welcomed Isaac, while John and Fiona welcomed baby Sophia.
- In a first for Capital Partners Callum McPherson and Tyler Ellery became provisional advisers which signals their progress in their Professional Year. In other news, Aden Wilkins completed his Master's degree and Rachel Cooper completed her commerce degree.
- Yasmin Weston was awarded Administrator of the Year in the Women in Finance awards.
- We were named in the 2020 WRK+ Top 25 Best Places to Work for under 100 employees.

While we are all looking forward to a well-earned break, we're also looking forward to 2022 with enthusiasm. We wish you and your loved ones a safe and happy Christmas. Thank you for your support and friendship over the year and we look forward to welcoming you back in the New Year.



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Founder and CEO of Capital Partners, and author of Wealth with Purpose, David firmly believes that sound, objective financial advice can transform peoples' lives and wellbeing. Find out more about how our evidence-based approach to wealth planning, investment management, legacy planning and insurance distinguishes our award-winning team, our results and our clients' lives.

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