



SUCCESS IS A TEAM EFFORT

As the 2021 FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Award recipient, Kathryn Creasy CFP® explains to Jayson Forrest the importance of team work when building a culture of success.

There must be something in the water of Western Australia, because these sandgropers regularly punch way above their weight when it comes to professional excellence. And as the 2021 recipient of the coveted FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Award, Kathryn Creasy CFP® is no exception.

A Principal and Wealth Adviser at Capital Partners Private Wealth Advisers, Kathryn joins a celebrated list of recent FPA Award winners working at this West Perth-based advice business.

Seemingly, David Andrew AFP® – the Founder and Managing Director of Capital Partners Private Wealth Advisers – has pioneered a winning formula of business success, which saw Capital Partners acknowledged by its peers for professional excellence by taking out the 2017 and 2019 FPA Professional Practice of the Year Awards.

Add to this the individual recognition of Michael Hayward CFP® for his outstanding approach to financial planning advice with his FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Award in 2017, and Emma Zwaan AFP® stepping up with her 2020 FPA Paraplanner of the Year Award, and it's not surprising that Capital Partners has quickly earned an enviable reputation as a business to watch.

However, as the latest Capital Partners recipient of an FPA Award, Kathryn admits to being “profoundly uncomfortable” by all the attention that comes with taking out this prestigious award.

“It may sound clichéd, but this award isn't won in isolation,” she says. “I work with a really great team, so my

motivation for participating in these awards was to showcase the work we do here at Capital Partners.

“As a business, we hold the FPA Awards in the highest of regard. So, by entering these awards, I wanted to let the whole team know that the support they give me makes us as a business, ‘best in class’. I believe that this type of acknowledgement is really important.”

Although Kathryn admits the FPA Awards application process was time-consuming, it was also insightful, providing her with the opportunity to reflect on the work she does for clients.

“It was an important opportunity to self-reflect on the ‘why’ of what we do as financial planners,” she says. “And while the interview process with the judges was particularly daunting, I felt reassured that the judges, who were also practitioners, fully understood what was happening at the coalface and the issues affecting planning professionals.”

DON'T BE AFRAID OF A CAREER CHANGE

Surprisingly, for someone so at ease with financial planning, it wasn't Kathryn's first career choice. She joined Capital Partners in 2014, after eight years working in stockbroking. And while she enjoyed this high-intensity environment, she reached out to Capital Partners, believing she could make a genuine difference to the lives of people, rather than just provide investment advice.

“I met with David a couple of times and was impressed by his passion for providing personalised, whole-of-life financial advice. After much discussion, I thought Capital Partners was a place

where I could really build a career,” Kathryn says.

However, she admits to having initial reservations about her switch in careers, as she adjusted to the less frenetic pace of financial planning. But as she began to look more closely at client situations, Kathryn soon realised just how strategic financial planning could be.

“When you look at a client's situation, it's like looking at different pieces of a puzzle. But when I spoke to clients and actually began to put these pieces together, I could see the results of this kind of strategic planning, which I absolutely loved,” she says. “I knew then that I had found my calling.”

KATHRYN CREASY CFP®

CAPITAL PARTNERS
PRIVATE WEALTH ADVISERS

**EDUCATIONAL
QUALIFICATIONS:** BCOM,
GDIPAPPFIN, GAICD, CFP®

POSITION: PRINCIPAL
AND WEALTH ADVISER,
HEAD OF ADVICE

LICENSEE: CAPITAL
PARTNERS CONSULTING

**YEARS AS A FINANCIAL
PLANNER:** 7 YEARS

CFP® DESIGNATION: 2017

TAKING ON A LEADERSHIP ROLE

The FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Award category recognises CFP® professionals who have delivered best practice advice that has led to superior client outcomes. This award category recognises worthy CFP® professionals who have demonstrated the highest professional standards embodied by an FPA member.

In taking out this award, the FPA Awards judges acknowledged Kathryn's outstanding approach to providing comprehensive financial planning advice to her clients, as well as mentoring those within her team and her involvement with the broader profession.

Prior to stepping down as FPA CEO, Dante De Gori CFP® said: "Kathryn exemplifies our FPA membership as a modern professional financial planner. She is a shining example to all those who are considering a career in financial planning and the life-changing difference our work can make with a client."

The judges were particularly drawn to Kathryn's leadership and mentoring role at Capital Partners, as

well as her skills as an accomplished financial planner. Today, Kathryn is a leading figure within the Capital Partners' team and a strong advocate of the collaborative, multi-disciplinary culture that first drew her to the business eight years ago.

As Head of Advice at Capital Partners, Kathryn has assumed an active leadership and mentoring role within the business. However, her influence and leadership has also extended to the broader profession, with Kathryn having chaired the FPA Women in Wealth Committee for the Western Australia Chapter in 2018.

Interestingly, for someone as accomplished, she confesses to having never sought a leadership role. But ask her about the qualities that make a good leader, and she points to three: listening, empathy, and respect.

"The key to leadership is being able to really listen and consider the opinions and viewpoints of other people. You need to be able to ask questions that go to the heart of the matter. As a practitioner, leadership is being able to lead your clients to make the right decisions. But you can't do that until you get to the heart of the problem, because the solution has to address that."

In awarding Kathryn the 2021 FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Award, the judges also acknowledged Kathryn's ability to uncomplicate issues for clients, including her approach to walking with her clients on a journey of discovery, in order to clarify the way forward for them and to quell their anxieties.

BUSINESS SUCCESS

As many other advice practices look enviously at Capital Partners' pedigree of excellence, Kathryn clearly attributes the business's success to one person – David Andrew AFP®.

"Over the last 20 years, David has progressively built this business to be an industry leader. He is himself, quite extraordinary. David is very clear that as a business, we're not only focused on our clients, but also on the entire team. He is adamant that Capital Partners has a beneficial impact on the lives of all its stakeholders - both clients and team members," says Kathryn.

"And it's because of this type of leadership and vision that I believe has enabled Capital Partners to continuously move forward and improve as a business."

As an example, one of the strengths of Capital Partners is its succession planning strategy. From its initial three partners – David Andrew AFP®, Michael Matthews CFP®, and Chris King CFP® – the business has expanded to 11 equity owners.

"The succession planning strategy that David has rolled out is the best that I've seen in any advice business. David, Michael and Chris were very clear that they wanted to grow the next generation of leaders from within the business, which David has driven."

Capital Partners has invested considerable time in fine-tuning this strategy, in addition to several other programs within the business that focus on core leadership and communications skills, as well as a cadetship program that targets second and third-year uni students wanting to embark on a career within financial planning.

"All of this feeds into a really great culture, that then feeds into people wanting to be successful and wanting to be a part of the business. I believe the recognition that Capital Partners and the team has received from the FPA Awards is a result of this," says Kathryn.

PANDEMIC PLANNING

Working through COVID-19 has been particularly challenging for financial planners, with constant lockdowns, travel restrictions, and continuing uncertainty affecting both practitioners and their clients. And while Kathryn agrees this disruption has been challenging, she adds that having a supportive workplace environment has enabled her to manage her work-life balance.

"We have a very supportive workplace culture at Capital Partners," she says. "There is always someone ready to step in and help you out when you're feeling overwhelmed, so it's comforting to know you're never on your own."

The business also prefers to focus on the positive, rather than the negative. For example, over the last 12 months, Capital Partners has implemented a workplace practise, where all internal meetings start with each attending team member quickly sharing something positive that has recently happened to them. Kathryn says this approach helps to frame the team's mindset before launching into a discussion.

Kathryn also manages her own wellbeing by switching off from work

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at the end of the day, to ensure she has a life outside of financial planning.

“Outside of the office, I make sure I maintain my personal routine, like going to the gym, playing golf, or having Saturday breakfasts with my girlfriends,” she says. “It’s important to remember that there is a whole other world out there separate to work that we need to live to its fullest, so that we can continue to be the best versions of ourselves when we’re back in the office.”

COMMITMENT TO EXCELLENCE

Ask Kathryn what she believes are the best qualities that make a successful CFP® practitioner and she lists three: the ability to listen, be empathetic, and have a commitment to professional excellence.

She explains: “Listening is paramount. That’s the only way you’re going to be able to fully understand a client’s objectives, needs and goals. Empathy is another quality that defines a great practitioner. The ability to be able to talk to clients when dealing with financial and emotional minefields, like separation and divorce, or assisting grieving clients, is a skill that takes practice and is absolutely essential for any financial planner.”

And her third quality that makes

a successful CFP® practitioner is a commitment to professional excellence.

“When legislation changes, planners should be interested enough to dive into the detail and understand how the changes apply to clients. Practitioners need to be at the top of their game to ensure that the technical strategies they develop are the most appropriate for their client’s individual circumstances.”

And the bedrock of professional excellence is a commitment to lifelong learning.

“My advice for any aspiring CFP® professional is to be prepared to take on learning, which never stops. Be curious, ask questions, and challenge the status quo. And take the time to listen, because listening is probably more important than speaking.”

And finally, she reiterates the importance of working with a team that supports you.

“I can’t emphasize this enough,” she says. “Winning the 2021 FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Award would not have been possible without the support of the team I work with, the mentors who I have had, and the business I work within.”

“So, for any aspiring CFP® professional, make sure you surround

yourself with the right people, be curious, and never stop learning. That’s because in this profession, success is a team effort. So, winning this award is about the achievements of the entire team at Capital Partners Private Wealth Advisers.”

FPA CERTIFIED FINANCIAL PLANNER® PROFESSIONAL OF THE YEAR AWARD

WINNER

KATHRYN CREASY CFP®
CAPITAL PARTNERS PRIVATE WEALTH ADVISERS (WA)

FINALISTS

MATTHEW MEEHAN CFP®
LIFESOLVER FINANCIAL (NSW)

NAOMI MEE-MARTINO CFP®
BASTION FINANCIAL GROUP (WA)

MARK O’FLYNN CFP®
TUPICOFFS (QLD)