

Case study

A partnership for practice growth & efficiency

Background

EJM Advice is a growing financial advisory firm with a mission to create happiness for their clients, employees, and communities. EJM Advice is focused on expanding its business both organically and through mergers and acquisitions. As their team has grown from 12 to 45 employees, and to position for further growth, EJM Advice sought to enhance its operational efficiency through the adoption of managed accounts, while maintaining high-quality client service and delivering consistent investment outcomes.

The objectives

1

Drive business growth

Expand organically and through mergers with a goal to help 10,000 clients in the next 5 years.

2

Increase operational efficiency

Streamline processes to handle the complexity of a larger team and growing client base.

3

Enhance investment consistency

Leverage external partners to help deliver consistent, high-quality investment advice across the business, regardless of adviser experience or personal preferences.

4

Mitigate risk

Reduce investment risk and key person risk through utilising a professional investment management team to help provide a better and more consistent client investment experience.

The solution

EJM partnered with Zenith Investment Partners to implement a customised managed accounts, providing a tailored solution that aligned with their investment philosophy and client objectives. This partnership allowed EJM to outsource its investment committee while maintaining adviser oversight, ensuring better client outcomes and greater operational efficiency.

The outcomes



Increased efficiency

Managed accounts reduced the need for manual processes, allowing advisers to see more clients and freeing up back-office staff to focus on growth initiatives.



Improved client outcomes

With Zenith managing the investments, advisers and clients had greater understanding of their investments and portfolios, and decisions were executed more quickly.



Business scalability

The efficiency gained from the managed account solution allowed EJM to scale their business without significantly increasing staff, supporting growth through acquisitions.



Consistent investment strategy

By partnering with Zenith, EJM ensured that all clients receive consistent, high-quality investment advice, enhancing trust and satisfaction, ultimately improving client outcome.

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Managed accounts have been a game changer. They've not only improved client outcomes but also allowed us to scale our business more efficiently, impacting more clients while reducing operational risk.

— Peter Monahan
CEO, EJM Advice

Why Zenith

EJM chose Zenith after speaking with several providers, with Peter Monahan highlighting the strong alignment between the two companies' values and growth goals. Zenith's commitment to understanding EJM's culture, seamless communication, and comprehensive support have proven instrumental in driving EJM's success.

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