



Optimum Business Forums

Sentry Optimum Business Forums

Although the current environment of financial advice is challenging, the future will be rich with opportunities for motivated professionals, who are focused on providing great outcomes for their clients and want to build a business of enduring value.

At Sentry, we know that quality advisers require services and support that empowers them to deliver high-quality advice and choice of leading solutions, to address the individual needs of clients.

The journey towards professionalism and the era of advice is well and truly underway and unstoppable and Optimum has been developed to future proof and position advice businesses for success in the post FoFA LIF and FASEA environment.

Why the excitement about Optimum

Because it's different to what you have experienced in the past. With Optimum, you are not being spoken to from the front of the room by so called experts with very little industry appreciation, and then asked to write meaningless intricate business plans and reports.

Getting out of your business and gaining perspective

The agenda is driven collectively by:

Learning from each other in a collegiate and supportive framework

Taking a steady approach to business improvement utilising simple tools, processes and thinking structures

'Accountability for action', a key component of the program, which has been universally applauded at the workshops

Sharing action plans, experiences, successes and lessons with colleagues and facilitators/coaches

'Getting out of the building' to work on their business, means advisers are provided with the time to think objectively about their business and the actions needed to realise its potential

The opportunity to benchmark and sanity check / test actions with the activities of fellow peers, which has been widely welcomed

Access to a network of highly skilled consultants and resources with hands on finance industry experience – and a track record of highly successful advice business clients

Encouraging business leadership

Practice Leaders' Roundtable

Optimum's roundtable forums are tailored to financial planning practice leaders. Members assist each other in solving their most pressing business issues and concerns, by relying on their peers to provide fresh perspectives and innovative solutions.

Speaker Workshops

Complimentary tailored specialist workshops offer access to Australia's leading business speakers and experts in a small group setting. Covering a wide range of topics to motivate and challenge members, fresh ideas and strategies that can easily be implemented.

Praise for the Optimum Business Forum program

"Optimum has come at a very opportune time for my practice and personally...it has been an incredibly energising experience.

Advice businesses can't continue doing the same things they've done in the past. If advice practices are going to grow into sustainable businesses they need to act now.

Optimum is not only the facilitator for change but it's a quantum leap into the future with a structure I need to take my business to the next level.

Nino Matkovic, Lumen Financial Strategists, Adelaide

"I want to grow, stretch and improve personally and my business and Optimum is the ideal program to help me achieve these goals.

Optimum is certainly going to challenge me personally and professionally but the opportunity to work with like-minded peers is a real plus.

In addition, for the sceptics it certainly answers the question "What's in it for me" with the benefits being a better business that's positioned for the future with the necessary processes and systems in place needed to achieve that goal."

Steven King, YV Financial Services, Victoria

Issued by

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