

\$100m Wealth Management MBI

Designing an integrated outsourced-services business model for financial adviser networks

The Challenge

High costs associated with supporting financial adviser networks created an opportunity for product-independent outsourced infrastructure and support services.



AT A GLANCE

\$100m

LBO / MBI

Australia

Financial planning & wealth management

Outsourcing

Front- and back-end services

Our Approach

- **Opportunity Research**
Evaluated outsourcing and offshoring opportunities.
- **Business Model Design**
Designed an integrated full-service outsourcing model.
- **Financial Analysis**
Developed the financial model and scenario analysis.
- **Business Formation**
Supported executive-team recruitment and efforts to secure a financing partner.

Outcome

Dialogue continued with prospective financing and technology infrastructure partners.

Experience Across the Journey

