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THE MARKET PLACE FOR SELLING YOUR FINANCIAL PLANNING BUSINESS

Chris has over 20 years experience in the financial services industry. He started his career as an adviser and has been both self-employed and an employee. In 1999 he moved into management roles more recently as General Manager of one of Australia's big four banking and funds management groups.

In his previous role, Chris headed the team responsible for acquiring financial planning businesses. Responsibilities included acquisitions and acquiring shareholdings in vendor run planning practices around Australia. This provided Chris with an in-depth knowledge of the market and an understanding of the dynamics needed for large institutions to participate in a market dominated by small to medium businesses.

It was here that Chris identified the need to create a marketplace for sellers and buyers to meet. He also recognised the need for management of the engagement process between practice owners and large institutions who buy or invest in small businesses.