



STEWART PARTNERS
Strategic Advice and Wealth Management

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To whom it may concern,

We began working with Ted in late 2011 on the strength of a referral from a colleague. It was an incredibly valuable introduction.

Ted's greatest strength was bringing clarity to our thinking – forcing us to stop and challenge ourselves. One of the workshops he conducted helped us to reconfirm what our value proposition is. For a long established business this may seem a simple process – and the statement we finished with was overwhelmingly endorsed by a subsequent client survey – but it took an incredible number of drafts and reflection to complete.

Ted has helped our management team clarify our critical success factors and what our key marketing strategies should be going forward. It is valuable having an external person facilitate this process, as it forces your team to take the time to focus on these matters and give them the attention they never receive in normal day to day operations.

When I attended a course in the U.S for top wealth advisers in late 2012, it was reassuring to see the ideas Ted had brought to our firm over the past year were consistent with advice from the best performing U.S wealth management firms.

The ongoing coaching Ted is providing will help ensure that we remain focused on priorities and deliver on them.

I have no hesitation recommending Ted to other firms looking to clarify the value they deliver to clients, how to communicate this clearly and concisely, and the priorities they should be focusing on to ensure success.

Please do not hesitate to contact me on 02 9146 8900.

Rick Walker BEc CPA SAFin CFP JP
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