

MONEY MATTERS

YOUR KEARNEY GROUP NEWS SOURCE



Kearney Financial Planning Named *Practice of the Year* in 2014

The Kearney Group has been awarded top honours by its licensee, Securitor Financial Group, who named the firm Victoria’s *Practice of the Year* for 2014.

The award was announced during today’s Securitor Professional Development Day in Melbourne and follows the Kearney Group’s *National Practice of the Year* title in 2011, Victorian *Practice of the Year* awards in 2012, 2011 and 2008, and an *Adviser of the Year* win for the firm’s CEO, Paul Kearney, in 2010.

“This is an extremely exciting time for the practice,” said Paul Kearney. “We’ve had a very busy twelve months and have made some significant changes to both the way we do business and how our clients are able to engage with us.”

One notable change at the firm is the introduction of *MyKearney Online*, a web portal which allows clients to securely send and receive sensitive financial information, and with integrated eSignature technology, users can also digitally sign tax returns, financial plan directives, loan applications and other time-sensitive documents at the click of a button.

Other landmarks of the past year include the firm’s move to electronic Portfolio Reports, introduction of the Kearney Group’s *Welcome Home Loan* service, and the development of real-time business reporting systems which allow employees to track performance against targets, view historical trends and assess future performance using complex forward projections.

“The team should be very proud of what has been achieved this year,” said Kearney. “It’s no small feat to adjust to all that change, but it’s really motivating when our clients, licensees and regulators recognise the value of our efforts.”

Practice of the Year nominees are assessed against a set of rigorous criteria and each nominee is required to demonstrate a commitment to best practice, ongoing business development, diversified revenue streams and first-class outcomes for clients.

“The Group’s recent success is credit to the firm’s investment ethos,” said Kearney. “Success requires unwavering focus on investing both time and money into client relationships, a high quality service offering, cutting-edge business systems, and training and growth opportunities for those employed by the practice.”

The Kearney Group’s passion for continuous improvement isn’t restricted to business operations though, and the firm actively encourages volunteerism in the wider community. The Group is now entering its 9th year as pro-bono advisers to Ovarian Cancer Australia and Paul Kearney is commencing his 8th year as a Director of the renowned social enterprise, The Big Issue.

As Victorian *Practice of the Year*, the Kearney Group is now in the running for the *National Practice of the Year* award. The National winner will be announced during the annual Securitor Convention in Hobart on April 11. ■■



Practice Profile

- **Established:** 1986 (Kearney Group/ Kearney & Co); 1998 (Kearney Financial Planning)
- **Location:** Abbotsford, Melbourne
- **Employees:** 38
- **Specialties:** Financial Planning, Debt Finance, Risk/ Insurance, Accounting, Taxation, Business Advice and Business Bookkeeping
- **Recognition:**
 - 2014, 2012, 2011, 2008 *Victorian Practice of the Year*
 - 2013 *FPA Best Practice Awards Runner Up* (P. Kearney)
 - 2011 *National Practice of the Year*
 - 2011 *CPA Young Achiever Awards Finalist* (L. Ezard)
 - 2010 *Adviser of the Year* (P. Kearney)