HPH Solutions

Partnering for Success

A Different Kind of Investor

"**As a planning business ourselves,** HPH Solutions offers *operational capability* and *real-world understanding* and experience to truly help your business scale."

We partner with financial planning businesses like yours; not just with capital, but with expertise, systems, and hands-on support to help you scale quicker.

Private Equity Model

Capital-focused Investment

The TRADITIONAL investment model, where capital is provided in exchange for equity, and the investor takes a basic shareholder role where your business continues to operate independently.

This model suits firms seeking funding support without the need for strategic or operational assistance.

HPH Solutions Partner Equity Model

Collaborative Minority Partnership

A minority investment where we PARTNER to grow with you. You bring your culture and ambition, and we bring frameworks in pricing, people development, client engagement, performance, and succession.

Together, we build best practice and commit our collective financial and intellectual capital for shared success.

HPH Solutions Primary Equity Model

Integrated Equity Partnership

A FULL INTEGRATION model where you exchange your business equity (some or all) for equity in HPH, operating under a shared brand, culture, and infrastructure. This approach provides the highest level of support and alignment, allowing advisers to focus on clients while benefiting from the collective strength of a larger enterprise.

Minority Equity Investment: You retain majority control.

Framework and Strategic Support: We roll out the operational tools, templates, and workflows that drive our business, tailored to yours. You can choose if, how and when to adopt the HPH approach across different facets of your business.

Building Value: By partnering with us, your growth potential expands, allowing you to capitalise some value today while still realising your upside as the business continues to grow.

Profits: By generating a return from our investments, HPH reinvests in innovation and new capabilities, enabling every partner to share in the gains and grow stronger through continuous improvement.

Pricing Clarity

- ✗ Inconsistent, legacy pricing undervalues advice.
- ✓ Fair, transparent, repeatable framework for service packages, with scripts.

Performance & Growth

- ✗ Advisers lack strategic targets or performance tracking.
- ✓ Data-backed goal setting, real-time dashboards, and career planners that balance ambition with sustainability.

People Development

- ✗ Reviews are subjective, staff lack clear progression, turnover is an issue.
- ✓ Evidence-based reviews with 360° feedback, salary bands, and skills matrices that link pay and promotion to both performance and culture.

Business Intelligence

- ✗ Principals don't have easy access to data in order to understand true business performance
- ✓ Dashboards, data reports and interpretation models for decision-making.

Client Engagement & Positioning

- ✗ Client engagement is inconsistent and lacks depth and confidence.
- ✓ Frameworks and wellbeing tools that help clients open up, uncover values and build deep trust, even with newer advisers.

Succession & Ownership

- ✗ No clear pathway for equity participation; succession uncertain.
- ✓ A structured ESOP with transparent eligibility, valuation, and financing that balances shareholder stability with next-gen opportunity.