

# 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.

Read more about our framework pillars

# The HPH Way

## PRICING

Establish a pricing model that reflects the real value your business delivers

### Pricing shouldn't feel this hard

- You're under pressure, stretched thin, and deep down you know pricing is part of the problem.
- The last pricing review was time-consuming and heavy, and now it's already out of date.
- You want to price properly, but you don't want to rock the boat with existing clients either.
- And you're not sure where to start, or what's even reasonable compared to other firms.

### Yet, avoiding pricing decisions doesn't protect your business

It makes things harder. Profit margins shrink, the team stays overloaded, and you stay stuck on the back foot, reacting rather than leading.

If pricing doesn't change, neither does your business.

### A simpler way forward

New pricing models don't have to mean endless analysis or a big overhaul.

#### We work with you to:

- Develop a simple pricing framework that reflects the true value you deliver. No more legacy pricing.
- Roll out changes in small, manageable steps to maintain trust and reduce pushback.
- Build your confidence to talk about pricing so client conversations stay value-led.

### What you'll walk away with...

- ✓ A future-proofed and transparent pricing model that grows with your business.
- ✓ Pricing clarity and confidence across your team.
- ✓ Higher profitability, so you can reinvest in capability and capacity.



PRICING  
CLARITY



# The HPH Way

## PEOPLE DEVELOPMENT

Build a clear, fair development framework that grows capability, confidence and future leaders.

### Developing people shouldn't be this hard

- You want high performance, but you also want fairness and clarity for your team.
- Reviews take too long, feel subjective, and rarely change behaviour.
- Progression pathways are unclear, creating frustration, attrition, or "quiet quitting."

### Without clear expectations and development pathways:

- High performers burn out.
- Emerging talent stalls.
- Leaders become bottlenecks.

The business becomes dependent on personalities rather than capability – and growth slows.



### A simpler way forward

Building a performance system doesn't need to be complex or bureaucratic.

### We work with you to:

- Create evidence-based review frameworks that remove subjectivity and set fair, consistent expectations.
- Establish clear role definitions, skills matrices and salary bands so people know what good looks like – and how to get there.
- Develop practical coaching rhythms for leaders, turning performance conversations from annual events into ongoing momentum.

### What you'll walk away with...

- ✓ A transparent pathway for growth that attracts and retains strong advisers and support staff.
- ✓ A performance culture that is motivating, fair and commercially aligned.
- ✓ A team with the capability and confidence to grow the business alongside you.



PEOPLE  
DEVELOPMENT



# CLIENT ENGAGEMENT & POSITIONING

Create consistent, confident client conversations that deepen trust and clearly articulate your value.

## Client engagement shouldn't feel this 'messy'

- Some meetings go brilliantly; others fall flat and you're not sure why.
- Advisers struggle to ask deeper questions or uncover meaningful client goals.
- Clients feel the value of advice inconsistently – especially across different advisers.

## When engagement varies by adviser style or confidence:

- Trust is inconsistent across advisers.
- Value is harder to articulate.
- Clients stay surface-level, making advice harder and stickiness weaker.



## A simpler way forward

Strengthening client engagement doesn't mean scripts or rigid processes.

### We work with you to:

- Introduce wellbeing and values-based engagement tools that help clients open up and create richer conversations.
- Build repeatable meeting structures that improve confidence for new advisers and consistency across the team.
- Elevate your firm's value story and positioning, so clients understand your impact – not just your process.

## What you'll walk away with...

- ✓ A clear, repeatable engagement approach that strengthens trust and elevates your brand.
- ✓ Advisers who feel confident leading richer, more meaningful client conversations.
- ✓ More engaged clients who stay longer, refer more, and progress through advice more decisively.



CLIENT  
ENGAGEMENT &  
POSITIONING



# PERFORMANCE & GROWTH

Establish a data-led performance framework that aligns individual ambition with sustainable business growth.

### Predicting growth shouldn't be guesswork

- Targets are vague, inconsistent, or built on hope rather than data.
- Advisers either under-stretch or over-stretch, creating frustration on both sides.
- There's no unified rhythm for accountability or strategic focus.
- You want a high-performance firm, but you don't want a sales-pressure culture.

### When growth isn't guided intentionally:

- Advisers drift, focusing on what's urgent rather than what moves the business forward.
- Leaders spend time chasing rather than coaching.
- The business lacks predictable momentum.



### A simpler way forward

A growth system can be motivating, transparent, and data-backed without feeling "salesy."

#### We work with you to:

- Build clear, sustainable adviser and team targets grounded in capacity and business reality.
- Provide real-time dashboards so advisers always know where they stand.
- Introduce career and growth planning that integrates personal goals with firm strategy.

### What you'll walk away with...

- ✓ A performance system that lifts results without compromising wellbeing or culture.
- ✓ Advisers who understand their goals, their progress, and how to grow sustainably.
- ✓ A business with momentum – driven by data, not intuition.



PERFORMANCE  
& GROWTH



# The HPH Way

## BUSINESS INTELLIGENCE

Turn business data into clear insight that supports better decisions, stronger margins and scalable growth.

### Knowing your key numbers shouldn't be a project

- You're busy, but unsure which activities actually drive profitability.
- You sense inefficiencies but can't see them clearly.
- Reporting is manual, inconsistent, or dependent on one person.
- You make big decisions without the clear insight you'd demand from your own clients.

### Without real visibility:

- You can't price properly.
- You can't set realistic targets.
- You can't see capacity or adviser load.
- You can't identify client segments that drain margin.

Decision-making becomes **guesswork**.

### A simpler way forward

Intelligence doesn't need complex systems or heavy analytics.

### We work with you to:

- Create dashboards that surface the numbers that matter, not noise.
- Build interpretation frameworks so your leaders can turn insight into action.
- Develop reporting rhythms that drive consistent, strategic decision-making.

Your data becomes a source of clarity, not confusion.

### What you'll walk away with...

- ✓ Clear visibility of business performance drivers.
- ✓ Confidence in pricing, planning, hiring and strategic decisions.
- ✓ A more profitable, predictable business supported by real insight – not guesswork.



# SUCCESSION & OWNERSHIP

Design a structured ownership and succession pathway that secures continuity, leadership depth and long-term value.

## Succession can't be rushed. Longevity requires foresight, planning and genuine buy-in.

- You want to reward loyalty and retain talent, but you're unsure how to structure equity.
- You know ownership must evolve, but the process feels risky or emotional.
- Valuations are unclear, pathways inconsistent, and timing undefined.
- You worry about losing key people because there's no clear future for them.

### Without a structured pathway:

- Future leaders don't progress and drive the business forward.
- You risk losing emerging talent.
- Exit planning becomes reactive instead of strategic.



### A simpler way forward

Succession can be structured, fair and motivating – not messy.

#### We work with you to:

- Design a clear ESOP with transparent eligibility, valuation and funding so opportunities feel achievable and fair.
- Build staged pathways that give emerging leaders a future they can see and plan for.
- Create succession plans that protect clients, culture and enterprise value.

### What you'll walk away with...

- ✓ A clear, fair ownership pathway that motivates the next generation.
- ✓ A de-risked succession plan that protects value and client relationships.
- ✓ A stronger, more enduring business with leadership depth.



SUCCESSION & OWNERSHIP

