



JONATHAN ELLIOT

PROFILE

Managing Director of Collins SBA
Adviser
Authorised Representative and
Responsible Manager of
SBA Advice Pty Ltd
Australian Financial Services License
488301

PERSONAL PROFILE FEATURED ON FOXTEL INDUSTRY LEADERS TV SEGMENT

<https://collinssba.com.au/collins-sba-industry-leaders-foxtel-tv-segment>

IFA PRACTICE PRINCIPAL OF THE YEAR 2017



CONTACT

PHONE:
0438 833 077

WEBSITE:
www.collinssba.com.au

EMAIL:
jelliot@collinssba.com.au

LINKEDIN
www.linkedin.com/in/jonathanelliotcfp

MANAGING DIRECTOR COLLINS SBA

EDUCATION

University of Tasmania

1995-1998
Bachelor of Commerce

Deakin University

1998 – 2000
Diploma of Financial Planning

University of Western Sydney

2000 - 2001
Certified Financial Planner professional designation

Kaplan

2015
Certificate IV in Finance and Mortgage Broking

MEMBERSHIPS

Financial Planning Association

1998 – Present
Certified Financial Planner

BT Open Advisory Council

July 2019 – Present
Advisory Council Board Member to BT Open

- BT Open is a provider of governance, compliance and practice management service to self-licensed AFSL businesses across Australia

WORK EXPERIENCE

Nov 2015 - Present

Managing Director

Responsible Manager of SBA Advice Pty Ltd, AFSL 488301

I lead our remarkable team of Accounting and Financial Planning professionals who work together to empower people to make the best financial decisions that deliver clarity, confidence and control.

During my tenure Collins SBA is well on track to achieving great outcomes for

People First

- Values driven
 - Our 'People First' value was one of my first initiatives to implement as MD and is core to Why and How we do things at Collins SBA
- I led the global first successful implementation of a 5 Hour Day to a professional financial services firm. This has delivered an exceptional culture of constant improvement, embracing innovation and client service focus whilst allowing our team to take responsibility for outcomes and being rewarded with flexibility to achieve a better work life balance

"It's not perfect and it's not for everyone, but in my 25 years of working, this is the most powerful workplace initiative I've ever been involved in. When parents talk about how excited they are to be able to pick up the kids at the end of the day, and earn a full-time wage, that's life-changing stuff."

- Claudia Parsons, Collins SBA Operations Director

"In summary working at Collins SBA with the benefit of the 5 Hour Day is a dream job for me. When Jono announced the business's intentions to introduce a 5 hour day I couldn't believe what he was saying and there are still times when I still can't believe it and how lucky I am"

- Mark Guy, Senior Account Collins SBA

"The idea of the eight-hour day is more than a century old and there is something strange about our attachment to it. A five-hour day may not be the answer for all. But I think it could work in many more places than a lot of us imagine."

- Pilita Clark, London Financial Times

- Ensuring that the outcomes of everything we do leads to our clients being empowered to make better financial decisions about their business and personal finances so they can live their own ideal lives

Results

- For the past 3 years our team are surveyed every 6 months to rate out of 10 their satisfaction with 10 different aspects of their Collins SBA experience and we have consistently an scored an average of at least > 8.3/10 consistently.
- Increasing of approximately 20% productivity as measure by the average reduction in work hours of team members whilst delivering greater output
- 12% reduction in sick leave
- Highest recorded revenue in Accounting Division for FY2019
- Highest recorded revenue in Financial Planning for FY2019
- Clear stretch metrics that are based on leading benchmark results of similar businesses, such as client advocacy to EBITDA, and we are on track to achieving within our agreed to time frame

Jan 2003 – Present

Head of Financial Planning Collins SBA

Adviser

I am responsible for the setting the strategic direction for the Financial Planning Division of Collins SBA, which includes

- Ensuring our team members understand and deliver on our philosophy of advice – Empowering people’s financial decision making to deliver clarity, confidence and control
- Create and implement frameworks from team structure, production capabilities, technology and compliance with our AFSL obligations
- **Adviser**
I provide Advice direct to clients to ensure their personal wealth decisions align with their goals and values. I also specialise in Business Succession Planning whereby I facilitate owners of businesses to come together and agree on how they will operationally and strategically run their businesses, ensure voluntary and involuntary succession is planned and funded, areas of business vulnerability are identified and managed. This involved project managing business owner clients and the myriad of internal politics; Accountants regarding valuations, structuring and tax planning; Risk Insurance Advisers to structure and fund involuntary succession trigger events; and Lawyers to draft and execute Shareholder and Buy Sell Deeds and personal estate planning.

2001 – 2005

Hobart Chapter Chair, Financial Planning Association

- Promoting membership
- Chairing monthly meetings
- Promoting financial planning to our community
- Directing FPA employees to organize Chapter events
- MC of Chapter events