



STRATEGIC ADVISORY FOR AMBITIOUS SME OWNERS

Business Planning & Management Consulting

We help ambitious business owners step back, evaluate what's working, and build a plan to scale with clarity and control.

A GUIDE FOR OWNERS WHO WANT A GENUINE STRATEGIC PARTNER

WHO WE WORK WITH

You've proven the business works. Now prove it can grow without you in every decision.

You're an ambitious SME owner generating significant revenue, already profitable, and looking at the next phase of growth. The problem isn't ambition - it's making the big calls alone, without a trusted commercial voice to pressure-test them. We work with owners who want a genuine strategic partner, not another service provider ticking boxes.

THE PROFILE, AT A GLANCE

\$4M–\$20M+

ANNUAL REVENUE

≥20%

NET PROFIT MARGIN

30–45

OWNER AGE

Growth-oriented

MINDSET

Calculated risk-taker

RISK PROFILE

Ambition without a sounding board runs out of road

Three categories of pressure we see consistently in scaling founders.



Strategic

- Plateauing growth or an unclear next phase
- Difficulty translating vision into a workable, funded plan
- No trusted sounding board to pressure-test decisions



Operational

- Team capability gaps and owner over-reliance
- Systems not keeping pace with growth
- The hard shift from operator to leader



Personal

- Time pressure and decision fatigue
- Business and personal wealth increasingly blurred
- Figuring the next stage out alone

A strategic partner, not a service provider



Strategic Planning

Structured planning sessions that turn ambition into a clear, actionable growth plan.



Management Consulting

An outside, commercially-experienced perspective on pricing, people, expansion and capital allocation.



Structured Advisory Touchpoints

Regular, scheduled sessions that keep strategy live, not something revisited once a year.



Integrated Advice

Strategy connected to your tax, financial and structuring position - not delivered in isolation.

HOW WE WORK

Direct, commercial, and genuinely proactive

- We lead with commercial outcomes, not technical capability
- Fixed-fee advisory packages, agreed upfront
- Direct communication - we challenge constructively, and expect pushback
- We're proactive - anticipating issues before they arise



“Turn business success into long-term wealth.”

WHAT CLIENTS TELL US THEY WANT

- ✓ Proactive advisory - not reactive compliance
- ✓ A trusted commercial sounding board
- ✓ Support to scale sustainably
- ✓ Access to a high-quality professional network

Is this the right fit for your business?



This is likely a strong fit

- \$4M+ revenue, profitable, and genuinely growth-oriented
- Wants a strategic partner, not a compliance-only relationship
- Comfortable with calculated risk and direct feedback
- Ready to invest in advice that pays for itself



Probably not the right fit

- Lifestyle business owners with no growth ambition
- Compliance-only mindset, resistant to strategic conversations
- Price-sensitive or fee-resistant to genuine advisory input



LET'S START THE CONVERSATION

Turn business success into long-term wealth.

If you're making the big calls without a trusted commercial voice in the room, let's change that.

AFFINITY ADVISORY

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