

The Goodman News



CHRISTMAS WISHES!

The team at Goodmans wishes you and your family a safe and happy Christmas. We hope the New Year brings good health, happiness and prosperity.

OFFICE CLOSURE

Our office will close at 12 noon on Friday 22 December 2017 and reopen at 8:30am on Tuesday 2 January 2018.

THANK YOU!

As 2017 draws to a close, so too do our 30 year anniversary celebrations. Reaching 30 years as a privately owned financial services firm is a rare milestone, and we could not have done it without your support. We have many people to thank.

Thank you to all who joined our 30 year party at the Brisbane Powerhouse with special guest leading futurist, social commentator and author, Bernard Salt AM. Bernard was a hit! In this edition of *The Good News*, we highlight the importance of celebrating significant milestones. Hopefully our 30 year party is evidence we practice what we preach.

Thank you to our community of clients. When we say we enjoy working with you, we really mean it. The reason we exist, and why we continue doing things differently, is to ensure you receive the highest standard of service.

Thank you to our dedicated team of employees, past and present. Your genuine care and willingness to go further for our clients is an enduring quality. In this edition,

we share an interview with one of those dedicated employees, Clancie Morrissey, who has been a valued member of our team for 20 years.

Rest assured, this milestone represents but our first 30 years. We have a clear strategic plan which will ensure our long-term future. We intend on growing the number of clients we serve, the breadth of the services we deliver, and the depth of our expertise.

Also in this edition, James Goodman talks about delegation and having a team you can entrust with your important financial decisions. We have long been trusted by successful families, and our growth plans mean this will be preserved into the future.

All the team at Goodmans would like to wish you and your family a safe and happy Christmas and we look forward to seeing you in the New Year.

Cheers!

Brad Church

Chief Executive and Senior Adviser



DELEGATION AND A HAPPY LIFE

Just wondering if you've ever thought about the important areas of your life that can't be delegated?

Let's start with your health. You can't ask someone else to go for a walk for you. You can't get someone else to eat a better diet for you, and you can't have someone else visit a counsellor in your place when you're having a rough trot.

What about relationships with family and friends? Perhaps it's true that occasionally we'd all like to delegate a family member somewhere or somehow. But, the reality is, our personal relationships require and are shaped by our physical and emotional presence.

What about free time and having fun? It is simply not possible to send someone else to the beach for you, and anyway, why would you?

Below is a diagram showing the important aspects of life. We could quibble a little over the categories and relative importance, but it's a good way to sum things up. My point is there's so much that's important in life that you simply can't delegate. There is more than we can fit into life, well, almost!

Why am I writing about delegation? It's because we think about it often here in the Goodman office when we are completing work for you.

One thing that can be delegated however is financial strategy decisions.

Imagine if you could find someone who understands you exactly – your situation, ambitions, and what's



JAMES GOODMAN
Senior Adviser

important to you. Someone with the right knowledge backed-up by a whole team of experts who diligently apply their combined skills to your affairs. Then, imagine this person is impeccably trustworthy.

Our view is, if you find this person – happy days! Your finances will be in much better shape, but that's not the best of it. You will have more personal and physical time and space freed up so you can do all the things in life that are more important to you than money.



One thing that **can be delegated** is financial strategy decisions.

Source: worldmonspace.com



"I sincerely treasure the lifelong friendships I've made with team members and clients over my 20 years at Goodmans."

Meet Clancie Morrissey

Clancie Morrissey, our Portfolio Administrator and Quality & Standards Manager, has been an integral team member for 20 years. In this edition we chat with Clancie about what she values most about working at Goodmans, her "home away from home".

What do you value most about your 20 years working at Goodmans?

What I value most is the loyalty, honesty and integrity Brad and James continue to embrace and project amongst our team. It feels very good to work each day where you're proud of the business and your colleagues. Also, I sincerely treasure the lifelong friendships I've made with team members and clients over my 20 years at Goodmans.

How has your role evolved over the years?

My role has continually evolved over the last 20 years which is very rewarding. From Portfolio Manager in my early days, then Client Relationship Manager for James' clients, I'm now enjoying the extension of my duties to Quality & Standards Manager.

What are some of your special memories of "life" at Goodmans?

I was very proud when we won the client management category of the

inaugural Asset Innovation Awards conducted by Asset Magazine/ Australian Financial Review.

It was a very big moment for all of us when our little team was recognised above much larger and longer established organisations. We knew we were doing great things for our clients but it was very rewarding to be independently recognised and celebrate in the spotlight.

2007 was also an important milestone for the Goodmans team. We enjoyed celebrating our 20 year anniversary and our strategic planning session at O'Reillys that year saw our team come together with a very clear and exciting vision for the future.

Describe what Goodmans means to you in 10 words or less...

Our clients and staff, past and present, are family. Goodmans is my home away from home.

Celebrating success

Watching an interview with then Prime Minister John Howard, in the day or two after his coalition was re-elected in 2004, one thing stuck in my mind.



JAMES GOODMAN

Senior Adviser

He suggested his elected coalition members and senators “take a moment of quiet reflection” before getting on with the job of running the country.

What struck me was the lack of celebration. Those words were a clear message to his team - now isn't the time for celebrating, it's just a brief pause and then the hard work of running the country begins.

Remember, Howard and his party had just accomplished an important milestone in winning the Federal election. That is no mean feat! At the time I thought...surely that's worth celebrating?

Milestones

Here at Goodmans, we are in the business of achieving milestones. We have seen hundreds and hundreds of personal goals achieved over the last 30 years. Most people appreciate there's a place for celebrating achievements and there's also a place for getting on and working hard towards the next thing.

Over the last three decades, we have noticed some people are better at goal achievement than others. My take is that as a group, our clients are generally better at working toward their next goal than they are at celebrating the one just achieved.

We have learned over many years about the importance of taking some time to celebrate:

1. If you can't have a celebration when an important goal is achieved, when else can you celebrate? It's about enjoying and appreciating life.

2. Greater celebration fuels motivation for the next goal. Celebrating the last goal makes success with the next milestone more likely.

We are getting better at reminding you to celebrate your achievements. This increases the rigour of your financial plan and our team can share in the satisfaction of each goal achieved.

So, when you accomplish your next goal, please follow 'Honest John's' advice and “take a moment of quiet reflection”. And when that reflection takes hold, I'd encourage you to turn up the volume and celebrate!

STAFF NEWS

Congratulations! Our Administration Manager Kathleen Grant recently completed a Diploma of Financial Planning having previously completed a Bachelor of Business (Marketing and Human Resource Management). These qualifications mean Kathleen can combine specialist knowledge and financial planning skills with providing high level communications and administrative support to our clients and our team.

Please visit our website (www.goodmanwealth.com.au) for more information about our people.



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