# Casey Wealth Advisers celebrates 25 years of advice, relationships and community

Lisa O'Sullivan reflects on the journey, the lessons learnt and the relationships that have helped shape the practice.

Twenty-five years ago, **Lisa O'Sullivan** started **Casey Wealth Advisers** in Berwick, Victoria with no clients or certainty about what the future looked like.

"There were no clients and it was just me," Lisa recalls.

A few former Westpac clients eventually found their way back to her, but the practice was largely built from the ground up. With the support of her long-time business partner, Peter Cousins, Lisa grew the business into the thriving advice practice it is today.

As Casey Wealth Advisers marks its 25-year anniversary, we spoke with Practice Principal Lisa O'Sullivan to reflect on the journey, the lessons learnt and the relationships that have helped shape the practice.

## Finding her path in advice

Before founding Casey Wealth Advisers, Lisa spent 17 years with Westpac. She started as a bank manager and financial advice wasn't part of the plan. At the time, Westpac launched a program called Project 40, selecting 40 bank managers and training them as financial advisers through Deakin University.

"It was really a win-win," says Lisa. "I really didn't like being a bank manager, so I took the opportunity and found that I loved being a financial planner."

The initiative shaped her career and when the opportunity came to start her own business, Lisa took the leap. Lisa credits long-time business partner **Peter Cousins** as a key contributor to the practice's success.

## The secret to long-term clients

One of Casey Wealth Advisers' proudest achievements is its long-standing client base, with some having been with the practice since it first started out 25 years ago. When asked about the secret to client loyalty, Lisa's answer is simple.

"I can put my hand on my heart and say I like every one of my clients."

She credits some early advice from Peter for shaping how she built the client base.

"When we take a new client on, we always ensure that our values align and that we genuinely like each other, we need to work closely and hope it's for twenty plus years." says Lisa.

The approach has helped create a business built on shared values and genuine relationships. The result is a practice where client relationships often span decades.

"They probably know too much about me and I probably know too much about them, but I never cringe when the phone rings... we like everyone that we do business with."

## Lessons from the GFC

Like many advisers, Lisa guided clients through the uncertainty of the Global Financial Crisis.

"I found lots of people ringing me that weren't necessarily my clients because they couldn't get on to their own adviser."

Looking back, it taught her one of the most important lessons of her career.

"I learned not to run away from clients in uncomfortable and turbulent times."

Casey Wealth introduced quarterly client morning teas, increasing communication and giving clients the opportunity to hear from experts, ask questions and connect with one another during an unprecedented period.

"Instead of trying to hide from clients when they're all worried, we saw them in groups by starting morning teas."

Seventeen years later, the morning teas are still running and have fostered a true sense of community amongst her clients.

"Some of our clients have been clients for over 20 years now," says Lisa. "I think they like to catch up with each other for a coffee and a cake."

The practice also hosts an annual client movie night at Christmas, bringing together up to 70 clients for an evening of food, entertainment and conversation. It’s an opportunity for Lisa and her team to come together with clients outside of formal review meetings.

"It's nice to have a few more points of contact during the year.”

## Investing in people

One of the milestones Lisa is most proud of centres around a team member who started with the business 17 years ago.

Lisa first met **Haley Dore** when she coached her at netball as a teenager. Recognising her potential, Lisa invited Haley to help with filing in the office.

That opportunity grew into a career. Today, Haley remains with Casey Wealth Advisers and has completed a Masters in Financial Planning.

For Lisa, it's a reflection of the importance of recognising potential and investing in people for the long term.

Watching Haley build her career and later return to work after having children strengthened Lisa's passion for supporting women in advice careers and advocating for more flexible return-to-work pathways for women returning from parental leave. She believes it’s essential if the profession wants to improve female representation in advice and make it easier for talented professionals to rebuild their careers.

## Leading as a woman in advice

Reflecting on the last 25 years, one achievement stands out.

"Being a practice principal as a female."

When Lisa entered the profession, it was common to find herself as one of the only women in the room. The experience has strengthened her passion for supporting other women in advice and creating opportunities.

Today, Casey Wealth Advisers is supported by an all-female team, many of whom have been with the business for years. Lisa is particularly proud of the friendly and fun culture they have built together.

## Looking ahead

While technology has changed significantly over the last 25 years, Lisa believes the biggest transformation is still to come.

She sees enormous potential in artificial intelligence but believes advisers must be careful not to lose the human connection that sits at the centre of advice.

"I've always been very focused on sitting with clients and collaborating," she says.

While many processes will become more automated, Lisa believes advisers will need to rethink how they engage with clients in an AI-enabled world. Rather than replacing advisers, she sees technology enhancing the client experience and allowing advisers to spend more time building meaningful relationships.

Lisa is particularly excited about the future possibilities of ERA[i] and the ways it could improve collaboration between advisers and clients.

## Advice for other practices

Reflecting on 25 years in business, Lisa credits much of the practice's success to having the right people around her. For her, having Peter focus on the financial side of the business was a key factor.

"I've then been able to concentrate on finding new clients and then retaining them."

When asked what advice she would give practices hoping to reach the same milestone, her answer comes back to partnership and focus. Having good people around you, understanding your strengths, making sure your staff are looked after and building relationships that last can make all the difference.

After 25 years, Casey Wealth Advisers continues to be built on the same foundation of trust, relationships, and helping clients feel comfortable enough to have meaningful conversations about their future.