



ACADEMIST CASE STUDY – LISA EVERITT

BIOGRAPHY

Lisa has been working in the Financial Services sector for over 25 years. Prior to joining the St. James's Place Academy, she had a successful career with NatWest Bank/RBS group as a Senior Business & Relationship Manager. In 2007, after 10 years of working with the bank, Lisa took some time out of the industry to raise her three daughters before deciding to join St. James's Place.

Lisa joined the Academy in May 2017. She spent the initial six months on an assessment programme; this equipped her with the expertise to provide first class professional advice in financial planning and wealth management. During this time, she also obtained a Diploma in Regulated Financial Planning.

Now in her second year of trading, Lisa has successfully grown her client base and recently employed an assistant to support her, as the business continues to expand. Her varied client base ranges from high profile celebrities in the music industry to first time investors, such as school mums who have had successful careers and are desperately seeking pension and investment advice.

WHY DID YOU JOIN THE ACADEMY?

To run my own business and be financially independent. However, I needed flexibility to support my family. I also understood that I needed to re-educate myself. The Academy provided the pathway, in a structured environment which ultimately supported me and gave me the ability to work smarter, harder and reap the rewards.

WHY DID YOU LEAVE YOUR PREVIOUS JOB / CAREER?

I was working part-time, I had three small children. We had to relocate due to my husband's work commitments where there was very little opportunity for me. I subsequently had a 10year career break, bringing up my family.

HOW HAVE YOU FOUND THE TRANSITION EXPERIENCE TO BECOMING A WEALTH ADVICE PROFESSIONAL?

I personally didn't find the transition too difficult because my background was in Financial Services. I had previously been working in portfolio management for one the top high street banks.

WHAT'S BEEN A HIGH POINT OF YOUR ACADEMY JOURNEY?

The huge amount of support and encouragement from my Academy Partnership Development Manager and my family, their belief in my success has been unwavering. Attending the 'Fast Start' lunch and Graduation.

WHAT'S BEEN A LOW POINT OF YOUR ACADEMY JOURNEY?

On certain days in the Academy, it all seemed like an enormous task but the first steps are always important. The exam pressure and the volume of study required took resilience. I am definitely a much better Adviser for having gone through the process.

WHAT WERE YOUR BIGGEST CONCERNS?

Clients and developing a network from scratch.

I grew up in Ireland and moved to the UK when I was 27 years old, so I didn't have the network of contacts that some of my fellow classmates had, such as an old school and university friends, family or an existing bank of clients. I knew that trust played a big part in being a financial adviser and I felt that I was at a disadvantage from the outset.

When I joined the Academy, we had numerous discussions from a very early stage about warming-up your network and attending networking events, as well as many other conversations about the importance of developing a strong rapport with potential clients. I listened intently to other SJP Partners to learn about their different client experiences, how they started to grow their networks and their challenges and successes.

One of the difficulties I faced was developing an early dialogue with someone who could become a potential client. How was I going to simply start a conversation?

So, as a way of trying to open-up a conversation, I started to personalise my story, adapting it for whoever I met and talked to in my network. I would share experiences of my own frustrations of trying to understand the different types of pensions and taxation before I'd joined the Academy, or that I'd become aware that I didn't have enough Personal Protection in place.

I also shared the stories of client experiences that I had picked up from other SJP Partners, as well as in the classroom, and quickly realised that my network was genuinely interested in what I wanted to talk about. They all had experienced similar worries or frustrations which they hadn't addressed plus they didn't know where to start.

Having had these very high-level conversations at the early stage really worked to my advantage; most of these people are now my clients and my only regret is that I didn't speak to more people earlier!

WHAT HAVE YOU LEARNED OR GAINED PROFESSIONALLY / PERSONALLY FROM THE ACADEMY?

It is possible to have a second successful career after taking time out to have a family.
You just need the right structure and support.

WHAT ARE YOUR IMPRESSIONS SINCE JOINING ST. JAMES'S PLACE?

The Academy provides a huge amount of support to help build your business, and is constantly updating, imparting knowledge, providing encouragement and opportunities for continued learning.

WHAT ARE YOUR HOBBIES AND INTERESTS OUTSIDE WORK?

Golf, running, cooking/entertaining and watching rugby.
I think it's important to surround myself with positive people and enjoy life.