

Hayes Girling: Quality is about putting clients first

Hayes Girling Financial has been part of the Count family for over two decades. So far, 2018 has already been a big year for the Melbourne-based firm – not only did the team win Count’s Outstanding Quality Award, but Hayes Girling’s financial planning manager Trini Montes was also honoured with Count’s Female Excellence in Advice Award.

Hayes Girling are no strangers to industry recognition. After being named as Count Member Firm of the Year in 2015, Hayes Girling’s director Barry Hayes received Count’s Pinnacle Award in 2016. A year later the team took out Count’s Excellence in Client Engagement Award, and now they’ve added the Outstanding Quality Award to their string of achievements.

Meanwhile, after rising through the ranks of Hayes Girling to head up the practice’s wealth management division, Trini was nominated as Count’s Female Adviser of the Year in 2015. Trini’s recent Female Excellence in Advice Award recognises her efforts in empowering women to take control of their finances.

Striving for excellence

Over the years, Hayes Girling’s management team have worked closely with Count to build a culture of excellence throughout the business. The firm’s Outstanding Quality Award reflects their passion for delivering holistic, high-quality advice to each of their clients.

“This award recognises the work we do with our clients,” Trini explained. “I set high standards for myself and for my team, and those same high standards are the norm throughout our workplace.”

According to Andrew Surman, Hayes Girling’s managing director, the team’s strong work ethic is driven by a desire to understand what’s most important to their clients.

“We pride ourselves on delivering advice that goes well beyond the best interest duty,” he said. “We also understand that if we’re going to deliver great client outcomes, our own house needs to be in good order. We have to dot every I and cross every T.”

To achieve outstanding results, Barry Hayes says it’s essential to devote adequate resourcing where it’s needed – and to know where to go for guidance.

“Our willingness to invest in the right resources has made a real difference,” said Barry. “And we’ve always looked at the Count team as being there to help us.”



From left: Trini Montes, Count General Manager Ed Box and Linda Le

The power of collaboration

Hayes Girling firmly believe that strong teamwork has been the cornerstone of their success. The firm's managers work closely together, and their team members enjoy being part of a supportive working environment.

Barry commented: "It's really quite simple – if the whole team doesn't step up to the plate, you won't get the results. Our whole team has put in the effort, and that's why we've been successful."

Each financial adviser in the firm has their own area of specialisation, such as aged care, SMSFs or insurance. This collective expertise enables the team to work together so they can achieve the best possible outcomes and take care of each client's total financial needs.

"When it comes to advice, we don't compromise on what's best for our clients," said Andrew. "We'll always refer them to another expert within the team if they need help in a particular area."

Hayes Girling's partnership with Count has also played an integral role in helping the firm deliver high-quality advice and service to each of their clients.

"We lean on the Count resources quite a lot," Andrew said. "We regularly pick up the phone to talk to the Quality Advice Assurance team or to our PDM, Vicki Massey, who connects us with the right people."

Financial empowerment for women

As a key component of Hayes Girling's service offering, the firm holds gala events each year specifically aimed at educating women on the value of financial advice. Since completing Count's Women and Financial Planning program in 2013, Trini organises these events and delivers a range of panel sessions and workshops.



From left: Jana Ivanov, Linda Le, Breeanna Lillee and Trini Montes

While Trini believes women are more in tune with their finances than when she first began working in the advice sector, she says there's still a long way to go until women achieve financial parity with men.

"Women are still lagging behind men in the way they manage their money and also in seeking financial advice," she said. "I think it's largely up to advisers to get the word out there to women about the importance of understanding their finances and getting quality advice."

To help more women get the advice they need, Trini regularly encourages referrals from her existing female clients. She also encourages these women to play an active role in managing their own finances.

"Many of our clients are couples who are either retirees or close to retirement," said Trini. "We point out to the women that they're likely to live longer than their husbands, so they need to know how to look after their finances too."

A great team to be part of

Despite their hard work and dedication to their clients, Hayes Girling haven't been immune to the recent challenges facing the financial advice industry. While dealing with evolving compliance obligations, they've also put a lot of energy into supporting their clients through the changes and managing their expectations.

Andrew commented: "With negative attention on the profession from the media, we've had to continually demonstrate to our clients and referral partners why we're worthy of their trust."

The team has looked at these challenges as an opportunity to improve their services as well as their client engagement processes.

And thanks to the team's combined efforts, many of Hayes Girling's clients have become more engaged with their finances as a result.

"Our clients love coming to see us, and a lot of that is down to the way we engage and help them achieve what's really important to them," Trini added.

Looking ahead, Hayes Girling have every reason to feel confident about the future. The business is currently in a period of growth, and they're now looking to build and upskill the team to meet the increasing demand for their services.

"We always hope that anyone who joins our firm will be the better for being associated with us," said Andrew. "Everyone in the team is of equal importance – we all learn from each other and we respect each other's opinions. It's a great team to be part of."



The Hayes Girling Team