

# JULIAN GILLMORE

FINANCIAL ADVISOR



# EVOLUTION ROAD BUSINESS

# BRYCE DEIN

SENIOR ACCOUNTANT



## Describe how you got started in your role?

Having completed a Business degree, I previously held advisory roles with businesses in NSW and WA. Most recently, I worked with State Super (now Aware Super) where I specialised in defined benefit super schemes for public sector employees.

With a view to expanding the range of services I provide clients, an opportunity arose at

Evolution Road and I haven't looked back.

## How does your company set itself apart from its competitors?

I really like how the business appreciates the need to nurture and invest in existing client relationships. It's easy to get

carried away with business growth and this can really impact the ability to provide a proactive service proposition to those who rely on us.

## What is your business's greatest asset?

It is definitely the way in which we introduce our clients to technology and how this can

typically save hours of paperwork. Many clients can reinvest that time into their businesses to increase the bottom line

which is what it's all about.

## What does a typical day look like for you?

Appointments, webinars, lunch meetings, Zoom calls. It is fairly frantic all year round but still enough time for a walk on the breakwall to enjoy this place we call home.

“ Many clients can reinvest that time into their businesses to increase the bottom line. ”

## Describe how you got started in your role?

I had always sought out a career in finance somewhere. Year 10 work experience with a local firm turned into picking up accounting as an HSC subject and onto a university degree some years ago. Now I'm a chartered accountant.

I am also lucky enough to work with my brother Reece at Evolution Road. We have similar traits and values so it makes for a productive workplace.

## How does your company set itself apart from its competitors?

A very proactive and purposeful use of cloud-based software such as Xero and Class, coupled with the ability to adapt quickly to an ever-changing technological landscape. We have

“ We have similar traits and values so it makes for a productive workplace. ”

a large number of small business owners who are quite savvy with applications and online systems so our service suits them perfectly.

## What is your business's greatest asset?

Definitely the many and varied skills of our staff in the business.

Given the range of financial

services we provide, their specialisations allow us to offer that holistic approach to our clients which is also quite unique in the local area.

## What does a typical day look like for you?

If I'm not in the office crunching numbers, you will find me onsite with clients learning more about their businesses. The more knowledge we have about a client, the better we can customise finance and accounting solutions for them.



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## **D**escribe how you got started in your business?

Evolution Road is a boutique advisory business which was established in the Port Macquarie area almost 5 years ago. Prior to this, we both had considerable experience in other accounting and advice businesses and sought to design a service proposition for small businesses and individuals which not only provided all financial services under the one roof but also embraced technology, efficiency and proactivity.

## **How has your business evolved since it began?**

From humble beginnings in 2016, we now boast a terrific team of 13 including four accountants and two financial planners. Just as intended back then, Evolution Road is essentially a 'one-stop financial shop', offering accounting, business advice, financial and retirement planning, self managed superannuation and mortgage broking services.

## **What is your business's greatest asset?**

Well, we have two. No business succeeds without a solid support staff and we have a beautiful group working hard behind the scenes. Additionally, our use of technology and cloud-based market leading applications also provides a much better experience for our clients. We recently became a Xero platinum champion which accounts for only 2% of accounting practices in Australia.

## **What is the most satisfying aspect of your roles?**

It's really being able to work together to provide our clients with an expansive and holistic service proposition in regard to their finances. Our accountants and financial planners will generally engage with clients collaboratively to cover all bases, especially during crucial stages such as establishing a business or retiring from the workforce. Providing positive outcomes every day is very rewarding for our staff.

## **What creative things do you do to develop a likeable company culture?**

Apart from providing as much flexibility as possible for employees including a hybrid model of working from home, we think it is important to engage and regroup with team events. Usually this includes an activity and meal to celebrate company milestones. We try to catch up socially at least once a month. Lately even the boardroom has seen frenetic Uno competition between staff.

## **How do you measure success in business?**

We believe that success is measured in positive client outcomes. That's what gives us a real kick out of being in business. Every time we receive a referral from a client, it is the reinforcement that suggests we are doing our jobs right.



**REECE**

**DEIN**

x

**MARK**

**POWER**