



# WizeGrowth Journey

Implementation Plan for:

# contents

THE WIZEGROWTH JOURNEY	03
SUMMARY	06
HOW IT WORKS	08
WIZEGROWTH ROADMAP	10
THE WIZE GUYS, MENTORS, AND TEAM	11
IMPORTANT DETAILS	16
COMMITMENT POLICY	19
WIZEGROWTH JOURNEY APPLICATION FOR ACCEPTANCE	21
THE LEGAL STUFF	22



# the WizeGrowth journey

When I started building my own firm, Sky Accountants, in Australia, I was excited! I was my own boss, my destiny was my own to create, I had lots of new clients coming on board and really liking the service I was giving them.

But that colourful picture quickly changed.

Before I knew it, I had too many clients to handle, they all wanted me to do their work and I was managing everything!

From licking the stamps on the mail to taking out the trash to visiting clients in their faraway office premises. Even though I had taken on staff, they too started saying they were too busy so I hired more and more and I worked more and more until it was out of control.

It got to the point where I was working 6-7 days a week, I never saw my wife or my kids, I was dreading going into the office each day and my health was suffering.

The emails and phone calls never stopped, even when I went on holiday I still had clients contacting me and my staff calling and emailing me.

I ended up quite depressed and started to resent my business. It got so bad that at one stage I end up in hospital for 3 nights. I couldn't even stand, I had completely lost my balance. The Dr said, "we can't rule out a tumour". In the end, the issue was I was overloaded with stress.

I decided that enough was enough and lifted my head to see who could help me.



I was always a believer in learning from mentors but I had been too busy to find one. I met and invested in coaches and consultants all over the world. But each time I found that I was getting told a lot of **WHAT** to do from people who had never actually done it successfully themselves. So I was still left figuring out **HOW** to implement the right things to grow without more pain.

That's when I met the mentor of all mentors for Accountants, Ed Chan. When I met Ed, he hadn't worked in his firm for over 20 years, but he still owned it and was paid a passive income by the business every year.

He was in complete control of his time and had the freedom to spend it how he wished. It was exactly what I had envisioned for my business and life.

I realised after working with Ed that I was the problem in my business. I was the bottleneck and if I didn't change, my business certainly wouldn't either.

That day, I made a promise to myself – that I would delegate every task I did and focus my time on building a business that wasn't reliant on me and give me more choices in life. Ed gave me not just the hope that I could do this, but every plan, tool, and word of advice to successfully take action. Cut to 5 years on and I am the CEO of Sky, I have zero clients, I spend zero time doing client work, at the end of each day I have zero emails in my inbox... AND I get to spend my time how I wish (on Wize) whilst receiving a passive income stream from the business.

I am now asking you to make the same promise to yourself. Embark on a journey with us in WizeGrowth and we will help you build the business you deserve, the one you always wanted. Let's build a business that gives you more choices - more time, money, and freedom to live the life you and your family have always dreamed of.

We look forward to working with you and achieving great things in the years to come!

Cheers,  
Jamie Johns  
Co-Founder & Mentor



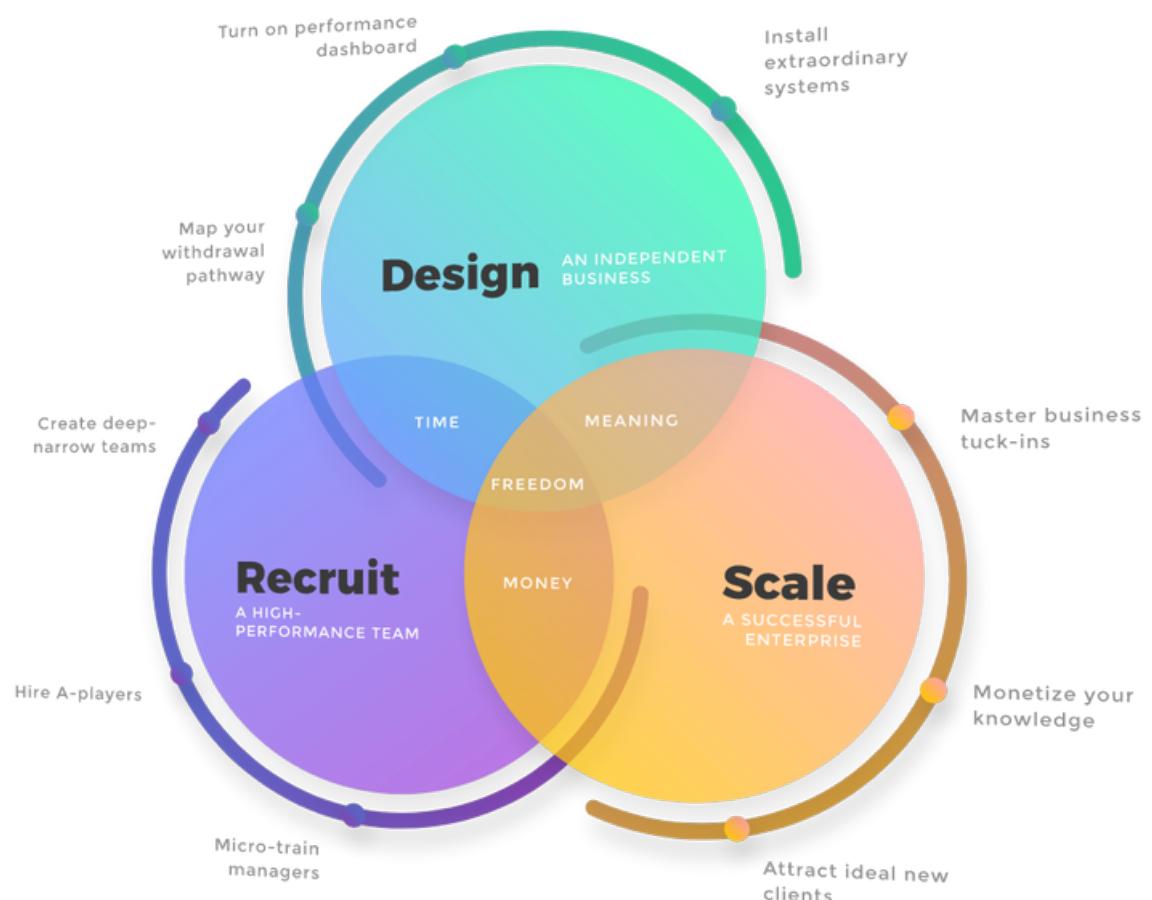
# WizeGrowth summary

## Delivery

We'd like to invite you to commence the WizeGrowth Journey.

WizeGrowth is designed to help practice owners implement the Wize Way. A tried and tested blueprint to scale their business and have it run independently of them.

If you accept the advice of the Wize Mentor team, take action and stay focused on the results, we know that you can transform your practice into a business and further to an investment vehicle that pays you a passive income.



# Objectives

The WizeGrowth Journey focuses on 3 core pillars to help you achieve your business goals:

**Design:** Helping you set the foundations of your firm so that it can scale sustainably without being reliant on you doing everything.

**Recruit:** Assisting you to develop a high-performing team that is productive, profitable and fulfilled.

**Scale:** Guiding you to turn on the marketing tap and accelerate the growth of your fee base with ideal new clients and services.

# Outcomes

1. Reduce owner's workload to less than 5 days a week, and normal office hours in the first 12 months.
2. Be in complete control of practice performance with a live financial performance dashboard with full firm oversight.
3. Have turn-key workflow systems in place to maximise the productivity of client work completed and streamline general practice operations.
4. Have team(s) structured (onshore and offshore) so that the right people are in the right seats doing the right work for the right price.
5. Have a strategic capacity-based recruitment plan in place for every new hire in the next 1-3 years.
6. Have staff trained, accountable and performance reviewed on a regular basis.
7. Have capacity, confidence and all the right tools to take on new clients and accelerate the growth of revenue.
8. Have a crystal clear pathway and plan to achieve the growth you need to earn your ideal passive income from the business.
9. Have complete control over how you spend your time.

# WizeGrowth how it works

## Mentor Meetings

### FOUNDATION PLANNING SESSIONS

You can commence the WizeGrowth journey in any month throughout the year (example timeline overleaf). To set you up for success, you will work with your Wize Mentor team via private scheduled sessions in what we call Foundation Planning Sessions.



Initially, you will undertake 2 x Foundation Planning Sessions (FPS) in the first 2 months. Your first FPS will be 3 hours and the following session will be 2 hours.

These sessions are used to develop your WizeGrowth Plan - organizational chart, team structure, capacity plan, strategic project list, and the firm's Fab5 financial KPI Dashboard.

### MONTHLY BOARD MEETINGS

Every available month following your foundation planning sessions, you will meet with a Wize Mentor for a 1 hour Accountability Board Meeting via Zoom. This meeting will address the following; your action plan progress, financial performance, and operational issues, challenges, and opportunities.

### CHECK-IN CALLS

You will be able to access the Wize Mentor team for 30 minutes check-in calls, as required.

## Group Events

### MONTHLY MASTERCLASS

We will host an online 2 hour Masterclass on the last Friday of each month. You will roll up your sleeves with your mentor team and WizeGrowth members to discuss challenges and explore opportunities.

### WIZEGROWTH QUARTERLY GROUP WORKSHOPS

These workshops are delivered online for all WizeGrowth firms and allow you to meet with your board to discuss action plans and seek council from the group. In these workshops, you will receive advice and will have time allocated to work ON your firm.



### WIZECON

You will be entitled to 2 discounted tickets to our next WizeCon conference held on July 2023 in Hamilton Island, Queensland, Australia.

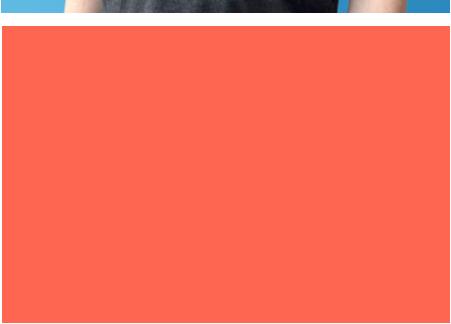
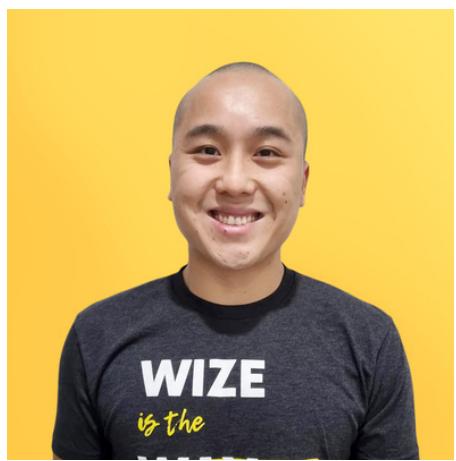


## Your Tribe

You will be introduced to your own WizeGrowth Accountability Tribe. This community consists of other like minded firm owners of a similar size and progress (non-competing) to learn, share and be accountable to. You will meet with these firms in our monthly and quarterly workshops.



# the wize guys and your mentor team



# WizeGrowth important details

## Investment Description and Fees

Members outside Australia

Currency	Turnover	Annual	Monthly	One off annual %
USD	UNDER\$1M	\$24,000	\$2,000	\$22,000
USD	OVER\$1M	\$30,000	\$2,500	\$27,500
USD	OVER\$2M	\$42,000	\$3,500	\$38,500

Members inside/based in Australia

Currency	Turnover	Annual	Monthly	One off annual %
AUD	UNDER\$1M	\$24,000 (+GST)	\$2,000 (+GST)	\$22,000 (+GST)
AUD	OVER\$1M	\$30,000 (+GST)	\$2,500 (+GST)	\$27,500 (+GST)
AUD	OVER\$2M	\$42,000 (+GST)	\$3,500 (+GST)	\$38,500 (+GST)

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**Note that your WizePulse monthly subscription ( required to access tools & WizeHub ) fee of AUD \$250 + GST ( \$197 USD ) per month is separate and in addition to this cost.**

You can accelerate through the WizeGrowth Journey as fast as you wish. From experience, the best results have come from spending at least 15 months working together. Therefore, we recommend this as the minimum timeframe commitment. Beyond this, your investment will continue on a month-by-month basis. Detailed terms and conditions can be found on the final page of this implementation plan.

## 90-Day Cooling Off Period



The WizeGrowth Journey comes with a 90-day cooling-off period, starting from the date your Implementation Plan is signed. If within the first 90 days, you don't feel Wize Mentoring is the right fit for your firm, you are entitled to cancel and no ongoing commitment will be enforced.

To exercise this, you are required to inform Wize Mentoring in writing of your wish to cancel. This must be acted upon before the initial 90 day period has passed. Beyond this period, the terms & conditions outlined on the final page will apply.

## Journey Commencement



Commencement of the WizeGrowth Journey will be as soon as possible in the current month, if not the first two weeks of next month.

## Next Step...

Please review our implementation plan commitment policy, sign as instructed, and complete your payment plan set up. Once completed, we will initiate your introduction to WizeGrowth.

# WizeGrowth commitment policy

## Our commitment to you:

We will openly provide you with all of our knowledge, experience, strategies and tools to help you successfully deploy and execute your Wize Growth Plan.

We will meet all agreed project deadlines.

We will return any communication received on the same business day, if not the very next day.

We will maintain the confidentiality of all information, conversations, and data pertaining to your firm unless shared with your approval.

We will give you all of our energy and attention in every interaction that you have with us. When we make an error or stuff up in some way, we will rectify this as quickly as possible.



We will introduce you to an amazing community of like-minded business owners and ensure you are made to feel welcome and part of the WizeGrowth community.



THE  
JOURNEY  
IS ON

## Your commitment to Wize:

You will approach each of our interactions with an open mind and a healthy appetite for debate.

You will implement everything that you commit to.

You will meet payment terms as specified.

You will respond to all emails, inquiries, information requests or communication promptly (within 48 hours of receiving them).

You will inform us immediately if there are any internal and external changes that may affect the successful completion of your commitments.

You will commit to stepping outside your comfort zone when it calls for it... that's where the lasting results are found.

Signed by Firm Owner: \_\_\_\_\_

# WizeGrowth Journey application for acceptance

## Firm Details:

Company Name

Primary Contact Name

Contact Email

Company Address

Contact Phone Number

## Payment Details:

Cardholder Name

Card Number

Expiry

CCV

## Acceptance:

Let's get started! My signature or provision of credit card details indicates I have read and agreed to the terms and conditions overleaf and authorise Wize Mentoring to get us started in WizeGrowth. If this implementation plan is not accepted on or before the end of the current month, the plan will be deemed null and void.

Authorised Signature

Date Signed



# WizeGrowth

## the legal stuff

### TERMS AND CONDITIONS

Permission to use the Materials is conditional upon you agreeing to these terms and conditions. Wize Mentoring Pty Ltd ("we", "us", "our") and the party named at Personal Details in the Application Form – ("you", "your").

#### 1. LICENCE

1.1 Pursuant to these terms and conditions you acquire a non-exclusive right to use the materials on these terms and conditions for as long as you remain up to date with the Mentoring fees.

1.2 You are authorised to sub-license the materials to your clients only. You remain wholly responsible for the use of the materials by your clients and must ensure that their use of the materials accords with these terms and conditions as if they were bound by them.

1.3 You agree that you will not use the materials in any way whatsoever except as specified in these terms and conditions.

1.4 You remain wholly responsible for the use of the materials by your personnel and must ensure that their use of the materials accords with these terms and conditions as if they were bound by them.

#### 2. TERM

2.1 Your Mentoring commences on the day that you accept these terms and continues for twelve monthly payments at the rate itemised on the registration form (minimum term).

2.2 Your Mentoring will continue after the minimum term of 15 months on a month-to-month basis, unless terminated by either party in accordance with clause 7.

#### 3. FEES

3.1 By accepting these terms you agree to pay the monthly fee, as set out in the Application Form.

#### 4. INTELLECTUAL PROPERTY

4.1 You agree that the materials contain proprietary information that is owned or licensed by us, and is protected by applicable intellectual property and other laws, including but not limited to copyright.

#### 5. LIABILITY AND INDEMNITY

5.1 The materials are provided to you at your own risk and you indemnify and release us to the fullest extent permitted by law from all claims resulting directly or indirectly from our provision of the materials to you.

5.2 Without prejudice to our other rights under these terms and conditions, you agree to indemnify and keep us indemnified against any loss, damages, expenses and costs incurred or suffered as a result of any of the following:

- (a) a breach of these terms and conditions by you; and
- (b) a willful or negligent act or omission by you.

5.3 All express or implied warranties, representations, statements, terms and conditions relating to the materials and these terms and conditions are excluded to the maximum extent permitted by law.

5.4 Nothing in these terms and conditions excludes, restricts or modifies any term, condition, warranty, right or remedy implied or imposed by any statute or regulation which cannot lawfully be excluded, restricted or modified, including the Competition and Consumer Act 2010 (Cth.) and corresponding Australian state or territory legislation, which contain provisions including implied conditions and warranties that apply to these terms and conditions or the materials (implied terms).

5.5 If there are any implied terms and we are able to limit your remedy for a breach of such implied term, then our liability for breach is limited to one or more of the following at our option:

- (a) in the case of goods, the replacement of the goods or the supply of equivalent goods, the repair of the goods, the payment of the cost of replacing the goods or of acquiring equivalent goods, or the payment of the cost of having the goods repaired; or
- (b) in the case of services, the supplying of the services again, or the payment of the cost of having the services supplied again.

6.6 Subject to our obligations with respect to implied terms, to the maximum extent permitted by law, we exclude all liability for all claims under or relating to these terms and conditions.

## 6. PAYMENT TERMS

6.1 You agree to pay the mentoring fee specified in the Application Form, as varied from time to time.

6.2 The fee will be debited to your nominated account or credit card commencing on the date your Mentoring commences.

6.3 If you have elected to pay the Fee by direct debit you must:

- (a) ensure sufficient funds are available in the nominated account each month to meet the monthly Fee; and
- (b) advise us if the nominated account details change or the account is closed, and make alternative arrangements for payment if this occurs

6.4 If you have elected to pay your fee monthly, your nominated account or credit card will be debited for that amount commencing on the date your Mentoring commences and on the anniversary of each month thereafter, until terminated in accordance with clause 7.

6.5 Cheques and EFT payments will not be accepted for payment of the monthly fee.

6.6 The monthly Mentoring fees stated in the Application Form are stated in Australian dollars unless agreed otherwise with you.

6.7 If your monthly fee is not paid on the due date, we reserve the right to cancel your Mentoring and access to the materials until such time as all fees have been paid.

6.8 We reserve the right to recover from you all costs associated with your failure to pay the Mentoring fee (including legal costs on a solicitor/own client basis).

## 7. TERMINATION

7.1 Subject to clause 8, you may only terminate your Mentoring prior to the expiry of the minimum term if you become subject to medical incapacity, for which you produce supporting documentation to our satisfaction from a qualified medical practitioner certifying that you are permanently sick or incapacitated.

7.2 Subject to clause 8, if you cancel your Mentoring prior to the expiry of the minimum term you remain liable for the fees for the remainder of the minimum term. No refunds will be made if you terminate your Mentoring before the expiry of the minimum term and you have paid the whole of that fee.

7.3 After the expiry of the minimum term you may terminate your Mentoring on 30 days' written notice to us.

7.4 Where your Mentoring is terminated, any fees that are unpaid at the date of termination must be paid and we may take action to recover the outstanding payments.

7.5 We may terminate your Mentoring immediately if you:

- (a) breach any term of these terms and conditions;
- (b) fail to pay your fee;
- (c) if you are a natural person, you take any step which results or may result in you becoming an insolvent under administration as defined in section 9 of the Corporations Act 2001 (Cth.); or
- (d) if you are a corporation, you are or take any step which results or may result in you becoming an externally administered body corporate as defined in section 9 of the Corporations Act 2001 (Cth.).

## 8. VARIATION

8.1 We reserve the right at any time to vary the fees, these terms and conditions, any aspect of our products and services or your Mentoring. We will give you at least one months' prior written notice of this occurring.

## 9. CHANGE OF DETAILS

9.1 You agree to advise us in writing immediately if there is any change to the personal details or payment details specified in the Application Form.

## 10. GOVERNING LAW

10.1 These terms and conditions will be governed under and construed in accordance with the laws in force in the state of New South Wales and the parties irrevocably submit to the jurisdiction of the courts of New South Wales.

## 11. YOUR COMMITMENT

You agree to adhere to all commitments as per the WizeGrowth Commitment Policy

## 12. CONFIDENTIALITY

As an authorised representative of the company specified on the front of this form, you agree that any information(written or verbal) which is disclosed is confidential and that relates to any other member's assets, business, financial affairs, business transactions, business methods, records, forms, charges, trade secrets or know-how, including without limitation its dealing with third parties that is not otherwise public knowledge,

will be treated as private and confidential and you will take all reasonable steps necessary to preserve its confidentiality.

## 13. DEFINITIONS

13.1 In these terms and conditions:

Claim means in relation to a person, a claim, demand, remedy, suit, injury, damage, loss, cost, liability, action, proceeding, right of action, claim for compensation or reimbursement or liability incurred by or to be made or recovered by or against the person, however arising and whether ascertained or unascertained, or immediate, future or contingent.

Materials means all of our software, information contained on our website, our products and services, and documents provided to you in connection with your Mentoring or otherwise.

Personnel means in relation to a party means the party's officers, office-holders, employees, agents and contractors

**It's time...**

**to build a business that runs  
without you**

**to live a life with more  
choices**



**start your own growth journey with us  
[www.wizementoring.com](http://www.wizementoring.com)**