

# STAYING CONNECTED THROUGH COVID-19



## PERPETUAL PRIVATE INSIGHTS

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Staying connected through an event like COVID-19 has been challenging. Many of our clients, advisers and staff have commented that time has felt like it's moving at a different pace. As the world has had to adjust and mobilise, we've acted on government instruction and set up radically different working arrangements. For the first time in many of our lives, we haven't been free to move far beyond our homes. In this environment, we reached out to Anthony Lam, Partner at Perpetual Private to ask how his advice team have adapted to service client needs and to share some stories about staying in touch, keeping fit and remaining healthy through this period.

### **An opportunity for reflection, growth and keeping it 'real'**

COVID-19 has undoubtedly changed the way we communicate and connect. Below we reflect on our own journey and highlight how some of our clients have adapted their lives and schedules considering the social distancing restrictions that were implemented over the past quarter.

Anthony Lam is a financial adviser leading a team of skilled advisers to support Perpetual's group of business owner and family office clients. He is passionate about developing trust-based relationships with his clients: "My philosophy is that my clients are at the forefront of all interactions. I start by listening to my clients to work together to build tailored and bespoke solutions to their pressing needs. Deep relationship building is key to the long-term intergenerational interactions that we have."

"While the pandemic was challenging in many ways, it's also been an opportunity to grow and develop both personally and professionally," asserts Anthony.

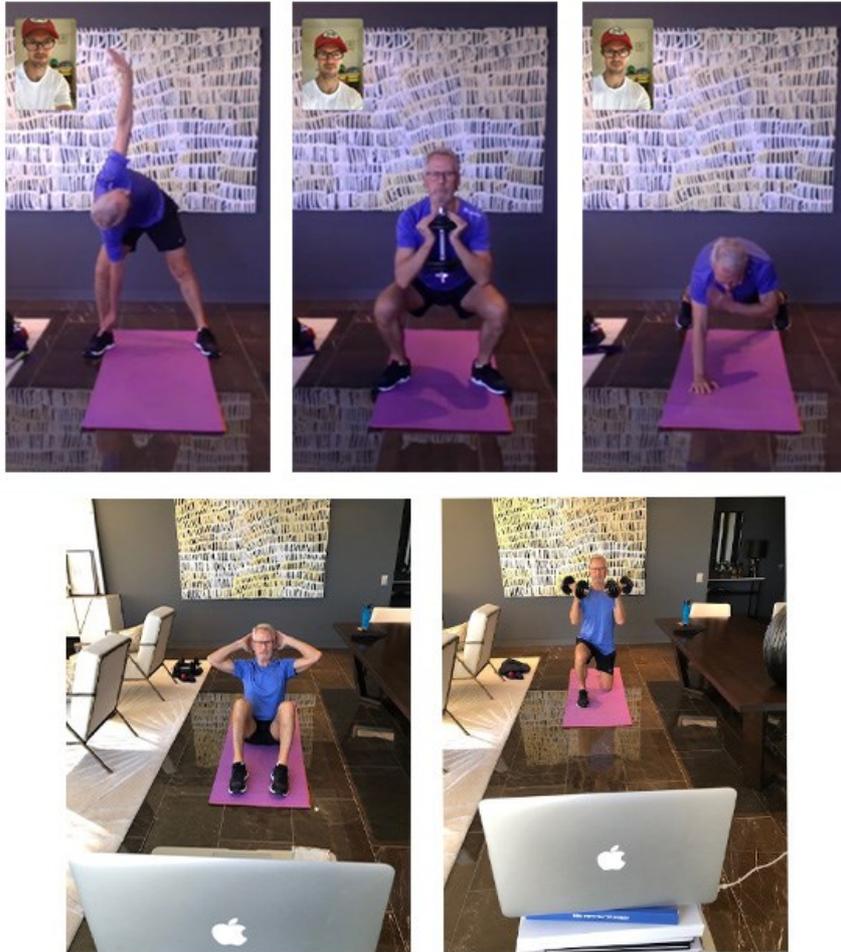
"When we first went into lockdown, I emailed all my clients to let them know how Perpetual Private and my team was responding to the isolation measures," he says.

"I shared how in our home office setup my fiancé Ben and I have desks side-by-side. With the shift to a working-from-home arrangement, I now also have more time to meditate before work and Ben and I aim to complete a 'virtual workout' session together with our friends in the evenings."

This sparked a conversation with one of Anthony’s clients – Robert Marriott– who shared with Anthony the ways that he too was adapting through the pandemic and some of the social restrictions that were being mandated by government.

“Robert called me and said he loved hearing about how we were adapting; he could imagine Ben and I working out together and this gave him a chuckle; he actually attended our engagement party last year, so he knows Ben well,” says Anthony.

“We got talking more and he told me about how he was continuing his Italian lessons (now virtually) and how he was keeping fit with online sessions with his personal trainer. He commented that his personal trainer, Todd Johnston, was really putting him through his paces; the virtual workouts were just as hard as in the gym, which he enjoyed.”



Perpetual Private client Robert Marriott remains fit and healthy with online personal training sessions

**Anthony’s advice to others in a client-facing role is to ‘keep it real’; that is, be genuine and authentic in the way you communicate. He jokes: “If clients see you as a real and genuine person, there’s less chance they will pick up the phone and scream at you.”**

### **Working in isolation doesn’t mean you have to be isolated**

Perpetual Private’s advice team schedule an end-of-week catchup most Friday afternoons in order to re-group, build employee morale and stay connected.

“It’s important to take some time out in the week to have a general chat; we down tools, catchup on how the week has been and just have a laugh with each other,” says Anthony.

He adds: “Incidentally, we’re loving using Microsoft Teams and it’s really helped us to collaborate and keep things ‘under control’, particularly with the increased workload from across the business.”

“An added benefit is it removes some clutter to our inboxes too.”





Perpetual Private's advice team wrap-up meeting is hosted every Friday through Microsoft teams. Pictured from left to right: Will Johnston (with toddler Andy), Evan Hill, William Ratcliffe and Anthony Lam (with furry companion Piper)

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