

Empowered success

A 10-year success plan
for women in broking



Lindy Kelly
Kelly & Co Finance

Nikki Berzin
Cherry Lending & Finance

Jessica Joyce
Wheels Finance

Leah Walkenhorst
Open Door Finance

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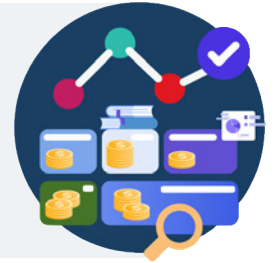
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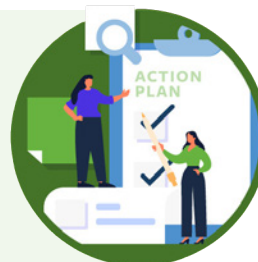
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March forward to your future

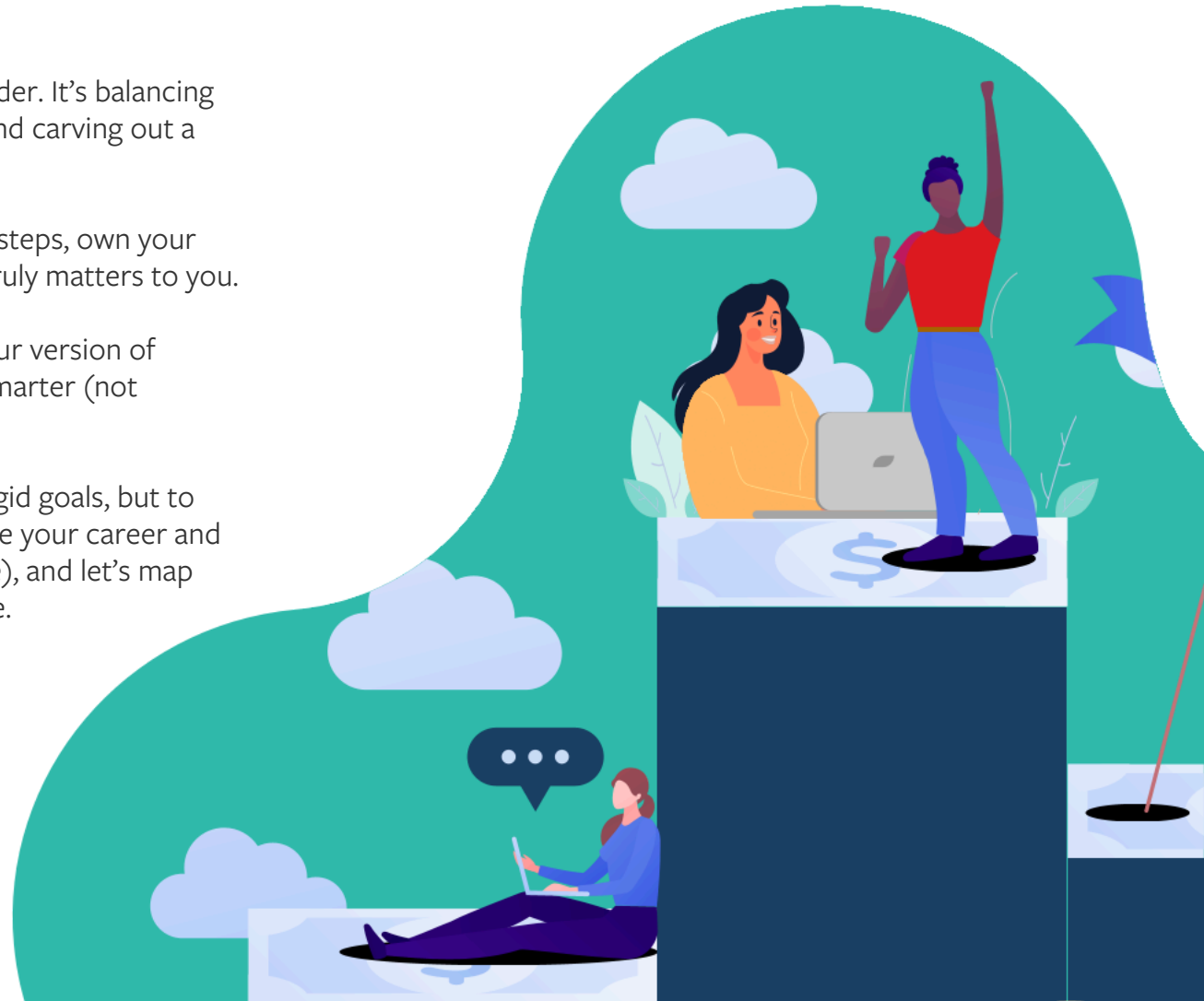
Let's be real—broking isn't just about numbers. It's about building something meaningful, making an impact, and creating a career that actually works for you.

For many women, success isn't just climbing the career ladder. It's balancing ambition with life, navigating challenges with confidence, and carving out a path that feels fulfilling—on your own terms.

That's why now is the time to march forward—to take bold steps, own your future, and create a business and life that align with what truly matters to you.

This guide isn't about one-size-fits-all success. It's about your version of success—whether that's growing your business, working smarter (not longer), or making time for the things that matter most.

A 10-year plan gives you a roadmap. Not to lock you into rigid goals, but to help you dream big, plan smart, and stay in control of where your career and life are heading. So, grab a coffee (or wine—we don't judge), and let's map out your future. It's time to march forward with confidence.



What is a 10-year plan and why does it matter?

A 10-year plan isn't just a business strategy — it's a way to align your career with your personal goals so you're making moves that feel right, not just what's expected.

Think of it as your playbook for success that helps you:



Grow your business in a way that fits your lifestyle.



Navigate industry shifts with confidence.



Make informed financial decisions for long-term security.



Balance work with the things that bring you joy.

And the best part? It evolves with you. You're in control, adjusting it as life (inevitably) changes.



How to create your plan

1

Get clear on your vision.

Close your eyes and picture your life 10 years from now. Where are you? What does your business look like? What do your days feel like?

Think beyond revenue goals—this is about crafting a career and life that energises you.

Career: Do you want to run a team? Be the go-to broker in a niche market? Work fewer hours with bigger impact?

Financial: What does financial freedom mean for you? Owning property? Early retirement? More security?

Lifestyle: Do you want more travel? More time for family? A business that runs itself?

Legacy: How do you want to be remembered? As a mentor? A leader in your industry? A changemaker?

Action Item: Jot down your answers as you'll need them for the next step.



How to create your plan



2

Set SMART goals.

Big dreams are great, but without action, they stay dreams. That's where SMART goals come in. Let's focus on a key goal: **growing your mortgage broking business.**

Here's how that goal becomes SMART:

Specific: Get crystal clear. "I want to double my revenue by expanding my client base and improving operational efficiency."

Measurable: Track progress. "I'll generate five new leads per month." "I'll monitor business performance through quarterly financial reviews with my accountant."

Achievable: Be ambitious, but realistic. "I have consistently grown my business over the past three years, and I will leverage my experience to scale further."

Relevant: Align with your bigger vision. "Building a larger client base supports my long-term goal of financial independence and early retirement."

Time-bound: Set deadlines. "I'll increase revenue by 20% by Year 3 and achieve my goal of doubling revenue by Year 10."

Action Item: Write down 3-5 SMART goals that align with your 10-year vision. Consider ongoing professional development, building your personal brand, holidaying at least once a year, or even starting a family.

How to create your plan

3

Break it down. A decade is a long time—so let's turn big goals into small, achievable steps that keep you moving forward.

Years 1-3: Laying the foundation

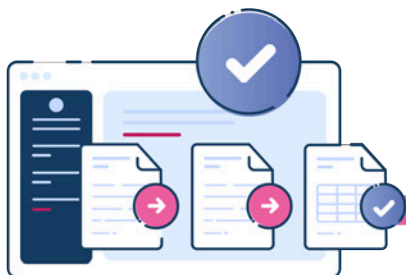
- Refine your niche and value proposition to stand out
- Strengthen your client acquisition strategy and establish a steady referral pipeline.
- Invest in industry certifications and training to enhance credibility.
- Set up a quarterly financial review system to track business growth.
- Build a predictable, sustainable income stream as a foundation for scaling.

Years 4-7: Expanding and scaling

- Grow your brand presence and optimise workflows for efficiency.
- Consider hiring support staff or outsourcing to free up time for high-value tasks.
- Strengthen networking and referral partnerships to generate consistent leads.
- Diversify revenue streams through new service offerings or strategic partnerships.
- Achieve at least 50% revenue growth, setting the stage for long-term success.

Years 8-10: Mastery and legacy

- Cement your reputation as an industry leader through mentoring or public speaking.
- Focus on long-term financial security and investment strategies.
- Explore passive income opportunities to create future flexibility.
- Step back from daily operations (if desired) while ensuring business sustainability.
- Hit your 10-year goal of doubling revenue, giving you the freedom to shape your next chapter.



Think of it as building momentum—each phase sets you up for the next.

Action Item: Break down your 10-year goal into these three phases. Define what success looks like at each stage and identify key priorities for the next 12 months.

Set yourself up for success

Leverage the right resources. You don't have to figure it all out alone.
Tap into:



Technology and automation – Work smarter, not harder.



Our free 10-year planning template - Get it on the next page!



Industry training and mentorship – Keep evolving and learning.



Networks and peer support – Surround yourself with women who get it.

Leveraging the right resources will help you reach your goals faster.

Your action plan

- 1 Reflect on your vision—what does success look like for you?
- 2 Set 3-5 SMART goals that align with your long-term vision.
- 3 Break them down into achievable steps for the next 3, 5, and 10 years.
- 4 Leverage the right resources, people, and tools to accelerate your success.
- 5 Stay flexible—adjust, evolve, and celebrate every milestone.

Need a place to start? We've got you covered.

To make this process easier, we've created a free 10-Year Success Planning Template - a practical tool to help you map out your goals, track progress, and stay focused on the bigger picture.

This template is built in Notion, a simple, intuitive platform that makes goal-setting easy to manage, update, and access on the go.

This isn't just about business—it's about designing a life that aligns with your values, aspirations, and priorities. From career growth and financial milestones to personal well-being and community impact, this tool will help you put your vision into action.

Ready to start shaping your future?

[Click here to get your free 10-year plan template.](#)

**Dream big. Plan boldly.
And march forward with confidence.**

Get in touch

 1300 65 66 37

 info@connective.com.au

 www.connective.com.au