CONSULTANT PROFILE

Consultant Profile - Joel Hewish

Business Management Consultant.

Founder, Halcyon Strategy Partners.
Creator of the Platinum Growth Accelerator.

Joel helps professional services firms strengthen operations, develop leadership capability and improve commercial performance, drawing on 20+ years building, scaling and operating businesses.

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PROFILE / 01

A Consultant Who's Built It, Scaled It, Led It

Where Real-World Experience Meets Strategic Advisory

Joel brings an owner's perspective to the operational and leadership challenges of growing a professional services firm.

His experience spans 20+ years in investment management, financial analysis, wealth management and building, scaling and operating businesses across financial services, funds management and real estate investment. He has carried responsibility for the commercial decisions, teams, systems and client relationships that sit behind business performance.

Today, Joel advises professional and technical services firms on operational transformation, leadership capability and performance optimisation. His work combines strategic thinking with disciplined execution.

Strategy carried into execution

Joel's approach is grounded in execution, accountability and continuous improvement. The emphasis is on translating business priorities into practical operating structures, clear responsibilities and consistent management disciplines.

> His consulting perspective is shaped by having built and operated businesses, with direct responsibility for both growth and the organisation required to support it.



TRACK RECORD / 02

Proven by Numbers That Back the Advice

Joel's experience includes building a financial services business from a small capital base and co-founding a property fund. These figures describe the scale of those businesses and the developments funded.

$5,000 to $10M+

United Global Capital grew from $5,000 seed capital and 6 clients to 1,400+ clients, 40+ staff, $10M+ annual revenue and $400M+ in funds.

$0 to $96.5M

Joel co-founded Global Capital Property Fund, scaling funds under management in 3 years and funding 15 projects.

$300M+

Combined gross realisable value of developments funded.

4.8 stars

Google rating across 60+ client reviews.

ADVISORY FOCUS / 03

Where Joel Creates Impact

Joel works across the strategic, growth, operational and transactional disciplines that determine whether a business can support its next stage of advancement.

Enterprise Operations Leadership

Multi-functional operations across sales, marketing, finance, client service and investment, with attention to how those functions work together.

Commercial Performance and P&L Ownership

Experience carrying commercial responsibility and P&L ownership across multiple entities.

Systems and Process Architecture

CRM, workflow automation and operating systems that enable scale and support consistent execution.

Transformation Leadership

Restructuring, performance uplift and alignment in growth-stage businesses as their operating requirements evolve.

Leadership and Culture

High-performance teams supported by strong accountability, leadership development and clear expectations.

Stakeholder and Investor Management

Management of HNW, institutional and executive relationships, informed by capital raising and investor-facing experience.

CURRENT PRACTICE / 04

Halcyon Strategy Partners

Operational performance, scalability and leadership effectiveness for growth-stage and established businesses.

Through his prior companies and his recent experience with Halcyon Strategy Partners, Joel has advised businesses in the areas of commercial strategy, growth planning, transactions, systems, workflows and leadership capability.

Building the operating structure

Joel designs scalable systems, workflows and accountability frameworks, and advises on commercial strategy, business structure and growth planning. The focus is on making strategic priorities practical within the day-to-day operation of the business.

Developing leadership capability

Leadership coaching and capability development support the people responsible for carrying those priorities forward. This work sits alongside operational design, linking clearer responsibilities with stronger management capability.

Platinum Growth Accelerator

Joel is the creator of the Platinum Growth Accelerator, a structured framework for business scaling, systems and commercial performance.

SELECTED ENGAGEMENT / 05

Selected Engagement: Ramsden Law and Ramsden Family Law

Joel's work with Ramsden Law and Ramsden Family Law spans legal practice operations, organisational structure, management systems and technology assessment.

Operational and structural review

The engagement included an operational and structural review across legal practice operations, together with workflow improvements, financial controls, accountability protocols and team performance cadences.

This scope brought operating processes and management disciplines into the same body of work, addressing how work moves through the practice and how responsibilities and performance are managed.

Practice management systems

Joel led the firms Practice Management System migration, enhancement and transition programs. These responsibilities extended the engagement from reviewing operations into leading changes to the systems supporting practice delivery.

AI assessment and procurement

He also led Ramsden's AI systems assessment and procurement program, adding technology evaluation and procurement to the broader operational remit.

Engagement scope shown; no quantified performance outcomes are asserted.

CAREER / 06

The Founder Journey

Joel's career progressed from wealth management, to investment management and founding and leading businesses, with responsibilities spanning marketing and sales, operations, investment and capital raising.

2011 to 2024 · United Global Capital

As Founder and CEO / Chief Investment Officer, Joel held responsibility for full P&L, HR, compliance, finance and operations. He was responsible for the development of its QVT (Quality, Value, Trend) investment methodology.

2019 to 2024 · Global Capital Property Fund

As Co-Founder and Director, he oversaw capital raising, investor relations, joint ventures and deal structuring across retail, HNW and sophisticated investors.

2009 to 2011 · Fortrend Securities

As Head of Private Wealth, Joel built the firm's first Private Wealth division, incorporating financial strategy advice with direct global investments across a braod array of asset classes.

2005 to 2009 · Morgan Wealth Management Group

Joel started as an investment research assistant before being quickly promoted into Private Wealth Advice.



CAREER / 06 · INVESTMENT

Investment Management and Capital Expertise

Joel led investment strategy, analytical frameworks and investment teams, with oversight of over $400M in funds under advice, management and administration.

Investment leadership

As Founder, CEO and Chief Investment Officer at United Global Capital, he directed the firm's investment strategy, philosophy, analytical frameworks and investment teams.

Capital raising and deal structuring

He structured, marketed and fulfilled capital raising across private, institutional, high-net-worth, retail and sophisticated investors. At Global Capital Property Fund, funds under management scaled from $0 to $96.5M in 3 years, funding 15 projects with combined gross realisable value exceeding $300M. He negotiated joint ventures, equity partnerships, financing arrangements, and closed many complex multimillion-dollar transactions.

Financial analysis and modelling

He built financial analysis models, budgets and forecasts, covering scenario planning, valuation, feasibility analysis, working capital optimisation and risk management.

Portfolio management and platforms

His role involved portfolio construction and investment research into some of the world's leading growth companies where is was directly responsible for the oversight of the firm's growth focused investment strategies. He worked with Bloomberg, IRESS, Eikon, Saxo Trader Pro, UNIP, XPlan and Coin.

Investment products managed

- Platinum Alpha Fund (global growth equities fund)
- Global Alpha Fund (growth focused hedge fund)
- Pivotal Diversified Fund (multi-asset class, multi-strategy fund)

QUALIFICATIONS / 07

Credentials and Capabilities

Joel combines formal finance and business education with practical capabilities in analysis, execution, sales leadership and team development.

Education

- Grad. Diploma of Applied Finance and Investment;
- Graduate Certificate of Financial Planning,
- Bachelor of Business (Banking and Finance) with Economics minor
- Diploma of Business (Banking & Finance)

Core skills

Financial modelling and analysis, valuation, strategic planning execution, marketing and sales process management, training and coaching, project management and public speaking.

These capabilities span both the analytical work behind commercial decisions and the communication and management disciplines involved in carrying those decisions into practice.

Platforms

HubSpot · Xero · M365 · Bloomberg · Eikon · CoPilot · ChatGPT · Perplexity · HighLevel

Beyond work

Joel's interests include enduro-x riding, gym and running, travel, stock and real estate investing, and building businesses.

CONTACT / 08

Let's Talk About Your Next Growth Ceiling

For founders and owners of professional and technical service firms seeking stronger operations, greater leadership capability and more disciplined execution.

Joel brings experience building and operating businesses to conversations about commercial performance, systems, structure and accountability. His advisory focus connects the growth priorities of the owner with the practical requirements of the organisation.

A practical starting point

A discussion can centre on the constraints facing the business today: operational complexity, workflows that need to scale, leadership responsibilities, or the systems required to support the next stage of growth.

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