Q&A

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Personal reflections and integration

Do you believe AI will act as an equaliser that lowers the barriers to entry for women looking to launch their own boutique advisory firms, or will it further consolidate power among the global hyperscale institutions that own the technology?

I believe AI has the potential to be a powerful equaliser. AI is the topic of our time, and keeping up with the pace of change requires continuous investment and learning. While larger organisations may have greater resources to invest in new technologies, AI is also giving smaller firms access to capabilities that were once out of reach.

For me, though, advisory will always be a people business. As a client, I would want the benefits of AI-enabled solutions, but I would also want the trust, experience, judgement and personal relationships that come from working with people. The most successful advisory firms will be those that combine both.

The phrase 'work-life balance' can feel mythical in transactional finance. How do you personally define and manage the integration of a demanding career with your personal life?

I've always liked the advice, 'When you're at work, be at work. When you're at home, be at home.' In a demanding profession, the lines can sometimes blur, particularly during busy periods, but I've learned that work-life balance is less about perfectly separating the two and more about being fully present in the moment. Equally important is the support of family, who provide perspective, encouragement and a reminder of what matters most. Making that conscious mental shift helps me maintain balance and get the most out of both my professional and personal life.

When the deal closes and the adrenaline drops, how do you intentionally disconnect, recharge, and protect your mental well-being?

When the deal closes and the pace slows down, I try to reconnect with the things that matter most: family, exercise and the outdoors. Spending time with my family helps me recharge, stay grounded and enjoy the moments that can easily be missed during busy periods, while exercise is one of the best ways I know to reset both physically and mentally. I also enjoy camping and spending time in open spaces, where I can switch off, clear my mind and recharge. Those moments away from the demands of work help me return with renewed energy and a fresh perspective.

How has your definition of 'success' changed from when you were an ambitious graduate to who you are today?

As a graduate, success was probably defined by many of the traditional markers: career progression, financial security, status and the things that come with them. While those remain important, my definition of success has broadened considerably over time.

Today, I see success as having a fulfilling and balanced life. It includes maintaining good health, spending meaningful time with family, helping clients achieve their goals, and knowing that the work I do has made a positive difference. It's also about having the opportunity to support and develop others, and finding satisfaction in their success.

Perhaps most importantly, I've come to appreciate that true wealth isn't measured only in financial terms. It's the combination of health, relationships, purpose, and the ability to make a positive impact that defines success for me today.

What is a daily ritual, habit or boundary you protect fiercely that keeps you grounded amidst the chaos of deal flows?

If there's one thing I try not to compromise on, it's sleep. A good night's rest gives me a clear mind, and I've often found that challenges or problems seem much easier to solve the next day. It helps me stay calm, focused and level-headed, no matter how busy things get.

Outside of the financial press and market tickers, what books, podcasts or philosophies shape how you lead and live?

One philosophy that has shaped me over the years is the importance of seeking different perspectives and never being too shy or too proud to ask for advice. I've been fortunate to work alongside incredibly talented people throughout my career, and one of the greatest advantages of being part of a consulting firm is having access to such a wide range of skills, experiences and viewpoints. I've learnt that collaboration often leads to better decisions and better outcomes than trying to solve everything on your own.

What is a personal passion or hobby you pursue that has absolutely nothing to do with finance, but keeps your perspective sharp?

My main passion outside of work is health and wellness. Since being diagnosed with Multiple Sclerosis (MS) in 2006, I have dedicated a significant amount of time to understanding how diet, supplements, lifestyle choices and exercise can support long-term health. I enjoy keeping up with medical advancements and evolving thinking in the field, researching different approaches, and having the discipline to implement and stick with those that have proven effective for me.

My journey has been about taking ownership of my health, and doing everything possible to keep MS under control and maintain an active lifestyle. It has taught me resilience, perseverance and the importance of continuous learning, while reinforcing my belief that a healthy body supports a healthy mind.

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