

CASE STUDY

Building Strategic Finance Partnerships



ALPHA NU
ACCOUNTANTS

CLIENT: Alpha Nu Accounts

WEBSITE: alphanu.com.au

INDUSTRY: Accounting and Business Advisory

INTERVIEWS: Nick Kaperonis and Andrew Antoniou

DURATION OF RELATIONSHIP: 5+ years

SERVICE USED: Business Finance, Personal Lending, Ongoing Finance Reviews

BACKGROUND

Alpha Nu is an accounting and business advisory firm supporting small to medium businesses for over 11 years.

The practice focuses on providing tax direct or indirect, superannuation general accounting, tax planning and tax advisory services with a hands-on and approachable and strategic approach, particularly for 'mum and dad' business owners in a way that breaks the traditional stereotype of accountants.

The team prides itself on proactive service and building strong relationships with clients as they grow. When it comes to finance, Alpha Nu expects any partners they refer to meet the same high standard of service, delivering outcomes, maintaining client relationships, and protecting their professional reputation.



Alpha Nu has worked with Velox Capital for more than five years. The relationship began when Gabriel Garcia Isola and Domenico Caria moved from ANZ to establish Velox Capital. Having previously experienced Gabriel's proactive service and personal attention, the Alpha Nu directors were confident continuing the relationship with Velox would deliver benefits for both their firm and their clients

THE CHALLENGE

As a finance-savvy firm, Alpha Nu had high expectations for their financial partners. While they had worked with banks and brokers previously, their experience had often been transactional, lacking continuity, personalisation, and post-settlement support.

Their priority was to find a broker who could match their own service standards. Someone they could trust with both their own finance needs and those of their clients. They needed a partner who was reliable, accessible, and proactive in seeking better deals even after settlement.



Key frustrations with previous brokers included:



Limited communication throughout the lending process



No follow-up after loan settlement



Clients being left without updates or status reports during applications



Brokers not renegotiating rates over time



Clients unable to reach brokers by phone or email during critical stages of the loan process



No visibility into how their application was progressing



THE VELOX CAPITAL DIFFERENCE

Velox Capital acted as a true extension of Alpha Nu's team. They delivered tailored solutions, offered options from multiple lenders, and provided clear guidance throughout the process.

"When we refer to them, it's like an extension of us. They maintain our standard and keep our reputation intact."



Velox Capital's service consistently stands out in the following ways:



Proactive communication: Clients and referrers are kept informed at every stage, with status updates and clear explanations of next steps



Ongoing relationship management: Velox contacts clients 6 to 12 months post-settlement with property reviews and rate reductions already negotiated



Personal engagement: Velox engages with Alpha Nu directly and adapts to each client's specific financial situation



Attention to detail: They help identify potential roadblocks early and guide clients through challenges based on deep lending experience



Ability to identify and mitigate issues before they became problems



Transparent reporting and follow-up with both Alpha Nu and their clients



Accessibility and responsiveness

“

They have systems in place to monitor loans and renegotiate rates. You receive an email saying, 'We've secured a better rate. Here's the new repayment.' No chasing needed.

They approach each situation from the customer's perspective.

They explain things clearly to clients and spot issues before they become problems. That comes from experience.

”

RESULTS

Velox Capital has delivered consistently strong outcomes for both Alpha Nu and their clients. In one example, Velox secured a business loan package that was approximately 1% cheaper than comparable options from other brokers, and completed around two months faster.

Across both personal and business lending, the process has been described as seamless, fast, and efficient, all while reducing stress and maintaining full transparency.

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They approach the situation from the customer's perspective. The questions they ask and the process they follow makes everything easier.

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LONG-TERM RELATIONSHIP

Velox continues to support both directors and their clients with finance solutions across business and personal lending, including SMSF-related finance. The team is responsive by phone or email, works flexibly, and is always focused on achieving the right outcome for the client.

“

They're professional, reliable and have a great attention to detail. You can always get hold of them, and they always get back to the client."

They're always working to improve the deal, not just settle and disappear. That's very rare in our experience.

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WHY ALPHA NU RECOMMENDS VELOX CAPITAL



Gabriel Garcia Isola
Director

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Personal service
that protects the
accountant–client
relationship



Proactive rate
reviews and loan
updates



Fast, informed
decision-making
with multiple lender
options



A genuine
partnership
approach with
shared “client-first”
values



Strong knowledge
in commercial,
business and SMSF
lending



In-depth experience
enables them to avoid
potential issues. They see
potential roadblocks and
proactively plan a path
around them and prepare
other options.



They get the best rate as
fast as possible with the
constraints of financial
institution



Clear explanations,
structured processes and
transparency for both
Alpha Nu and the client



Clients stay informed and
supported well beyond
settlement

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“They’re not just a broker –they’re a partner. Always contactable, focused on outcomes, and willing to adapt to achieve the right result.”

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CONTACT DETAILS

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