



21 Jul 2017

The Australian, Australia

Section: The Deal • Article type : News Item • Audience : 96,602 • Page: 21
Printed Size: 5524.00cm² • Market: National • Country: Australia • ASR: AUD 111,632
Words: 2720 • Item ID: 812912575

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Page 1 of 5

THE DEAL | July 2017

21

Australia's Top 50 Financial Advisers

in association with

BARRON'S

How we did it

The inaugural version of the Top 50 survey comprises 73 questions covering everything from the financial performance of the advisers' practices to their credentials, their education, and their charitable and philanthropic work. The goal of the ratings is twofold:

1. To provide consumers with a selection of quality advisers
2. To establish a benchmark for a high standard of client care that all advisers can emulate.

Our rating formula includes both quantitative and qualitative calculations. The quantitative includes the amount of client assets an adviser oversees and the fees generated by those assets. These dollar figures function as concrete indicators of client satisfaction – people effectively voting for their adviser's service with their hard-earned money. The qualitative factors include advisers' professional credentials, the size of their staff relative to their client base, their experience in the financial services industry and more.

To keep the survey pool focused, we created an advisory board in Australia comprising asset managers, consultants, and executives at banks and independent advisory firms. This board nominated just over 200 of the nation's best financial advisers, 96 of whom filled out survey forms for a response rate of 47 per cent.



Online at
theaustralian.com.au/top-50-advisers



Rank 1
Name Scott Carmichael
Firm Escala Partners
Location Melbourne
Years of planning experience 19
Minimum account size \$1 million
Size of team 4
Funds under advisement \$900 million

Our advice is always objective and considered, uninhibited by proprietary products or business alliances, and grounded in research.



Rank 2
Name Will Hamilton
Firm Hamilton Wealth Management
Location Glen Iris, VIC
Years of planning experience 32
Minimum account size \$1.5 million
Size of team 7
Funds under advisement \$400 million

Drawing on years of experience with clients and financial institutions in Australia and internationally, our advisory services continue to succeed in delivering bespoke outcomes with a strong emphasis on risk management.



Rank 3
Name Marc Smith
Firm BT Advice
Location Brisbane
Years of planning experience 18
Minimum account size \$1 million
Size of team 8
Funds under advisement \$375 million

My job is to break down the technical jargon in a way clients can understand and that will resonate. There is a real heart and humanity behind every decision I make for them.



Rank 4
Name Thomas Murphy
Firm Escala Partners
Location Sydney
Years of planning experience 17
Minimum account size \$5 million
Size of team 9
Funds under advisement \$1.1 billion

What most differentiates me is my interest in geopolitical trends influencing capital flows. This complements my investment market background.



Rank 5
Name Phillip Gillard
Firm Shadforth Financial Group
Location Sydney
Years of planning experience 21
Minimum account size No minimum
Size of team 1
Funds under advisement \$297 million

To understand what is important to you, to diagnose complex issues and implement solutions. To coach you, to measure your progress. To educate you to allow you to make informed decisions.



Rank 6
Name Douglas Turek
Firm Professional Wealth Pty Ltd
Location Melbourne
Years of planning experience 12
Minimum account size \$1 million
Size of team 4
Funds under advisement \$300 million

Help accumulators to make work optional and the already wealthy to preserve and enjoy their financial security.



Rank 7
Name Campbell Sorell
Firm Shadforth Financial Group
Location Melbourne
Years of planning experience 16
Minimum account size No minimum
Size of team 4
Funds under advisement \$259 million

Providing others with freedom and confidence so that they can spend more time doing what they love.



Rank 8
Name Mark Minchin
Firm Minchin Moore Private Wealth Advisers
Location Mosman, NSW
Years of planning experience 14
Minimum account size No minimum
Size of team 13
Funds under advisement \$925 million

By providing clients with the necessary background information coupled with our financial wisdom, we enhance their financial decisions. We strive to bring greater affluence, certainty and security to their lives.



Rank 9
Name Paul Nicol
Firm GFM Wealth Advisory
Location Camberwell, VIC
Years of planning experience 18
Minimum account size No minimum
Size of team 26
Funds under advisement \$700 million

We offer a full, one-stop SMSF service, including set-up, compliance and administration, investment advice and portfolio management, and accounting.



Rank 10
Name Chris Smith
Firm VISIS Private Wealth
Location Brisbane
Years of planning experience 18
Minimum account size \$500,000
Size of team 12
Funds under advisement \$230 million

We offer a comprehensive range of services incorporating a traditional approach to planning supported by the latest technology.



Rank 11
Name Nerida Hicks
Firm Bridges Financial Services
Location Nowra, NSW
Years of planning experience 12
Minimum account size No minimum
Size of team 5
Funds under advisement \$261 million

In everything we do we believe in challenging the "normal". We believe in thinking differently, offering a service that is friendly and simple, but which has impact.



Rank 12
Name Luke Eres
Firm Innate Financial Services Group
Location Keilor, VIC
Years of planning experience 21
Minimum account size \$500,000
Size of team 10
Funds under advisement \$500 million

A better life. A better business. A better world.



Rank 13
Name John Manuel
Firm Prosperity Advisers Group
Location Newcastle, NSW
Years of planning experience 15
Minimum account size \$10,000
Size of team 18
Funds under advisement \$465 million

One team, One plan, smart advice.
A multidisciplinary team of experts delivering holistic advice.



Rank 14
Name Neil Kendall
Firm Tropicoffs
Location Brisbane
Years of planning experience 15
Minimum account size No minimum
Size of team 22
Funds under advisement \$862 million

I am the Money Worrier. I worry about people's money so they don't have to.



Rank 15
Name Sally Huynh
Firm Shadforth Financial Group
Location Brisbane
Years of planning experience 14
Minimum account size No minimum
Size of team 25
Funds under advisement \$224 million

I give advice to clients like I would give to my own family, honest advice to give them realistic options to consider so they can make smarter and more sustainable financial decisions to secure their future.



Rank 16
Name Jeremy Taylor
Firm Shadforth Financial Group
Location Melbourne
Years of planning experience 11
Minimum account size No minimum
Size of team 3
Funds under advisement \$211 million

I help clients clarify and prioritise their most important goals. I then use interactive cashflow modelling to test those goals and put in place the right strategies to achieve them.



Rank 17
Name Rowan Fielke
Firm Thornton Group
Location Dulwich, SA
Years of planning experience 22
Minimum account size \$100,000
Size of team 18
Funds under advisement \$550 million

Our holistic approach is highly personalised and maintained with strong relationships for ongoing service.



Rank 18
Name Bentley Klein
Firm Axios Financial Solutions Pty Ltd
Location Melbourne
Years of planning experience 29
Minimum account size No minimum
Size of team 13
Funds under advisement \$395 million

Helping you understand the financial impact of a decision before you make one; helping you to reach your true financial and lifestyle potential; helping you to achieve a certain future.



Rank 19
Name Troy Theobald
Firm Robina Financial Solutions
Location Robina, QLD
Years of planning experience 21
Minimum account size \$150,000
Size of team 14
Funds under advisement \$241 million

We inspire people to live their ideal life by helping them achieve financial certainty.



Rank 20
Name Michael Thompson
Firm BT Advice
Location Pinjarra, WA
Years of planning experience 17
Minimum account size \$150,000
Size of team 10
Funds under advisement \$300 million

To always put the client in a better position.



Rank 21
Name Daniel White
Firm Shadforth Financial Group
Location Brisbane
Years of planning experience 11
Minimum account size No minimum
Size of team 4
Funds under advisement \$190 million

To understand my clients' goals, provide peace of mind and simplify their finances.



Rank 22
Name Peter Nonnenmacher
Firm Hillross Macarthur
Location Campbelltown, NSW
Years of planning experience 26
Minimum account size \$150,000
Size of team 10
Funds under advisement \$178 million

There is a lot of noise around wealth creation and not much about why. Once we know why, we can help clients reach financial freedom.



Rank 23
Name Anthony Catt
Firm Catapult Wealth
Location Norwood, SA
Years of planning experience 14
Minimum account size No minimum
Size of team 7
Funds under advisement \$400 million

Our clients value our transparency, direct investment approach, income predictability and that we aim to be there when it counts.



Rank 24
Name David Pamflett
Firm BT Advice
Location Broadbeach, QLD
Years of planning experience 31
Minimum account size \$50,000
Size of team 5
Funds under advisement \$280 million

To provide ongoing holistic wealth creation and preservation solutions based on our high net wealth clients' evolving needs, taking into account their real fears, goals and frustrations.



Rank 25
Name Dean Gilkison
Firm Gilkison Investments
Location Como, WA
Years of planning experience 18
Minimum account size No minimum
Size of team 10
Funds under advisement \$170 million

We develop highly personalised relationships with our clients and a multi-generational focus.



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Rank 26
Name John Tsiokaras
Firm BT Advice
Location Sydney
Years of planning experience 12
Minimum account size \$500,000
Size of team 6
Funds under advisement \$180 million

To make an impact, engage and enjoy close relationships with our client community.



Rank 27
Name George Kambourglou
Firm BT Advice
Location Sydney
Years of planning experience 19
Minimum account size \$50,000
Size of team 5
Funds under advisement \$220 million

To take the financial uncertainty out of people's lives by providing affordable and valuable advice



Rank 28
Name Claire Mackay
Firm Quantum Financial
Location Sydney
Years of planning experience 8
Minimum account size No minimum
Size of team 9
Funds under advisement \$313 million

I work with a select number of clients so I can give them the attention they expect.



Rank 29
Name Brett Stein
Firm BT Advice
Location Sydney
Years of planning experience 25
Minimum account size \$300,000
Size of team 3
Funds under advisement \$159 million

To empower our clients to make informed decisions to improve their wealth and lifestyle through personalised strategies that address all their financial planning needs.



Rank 30
Name Todd Hammond
Firm BT Advice
Location Brisbane
Years of planning experience 23
Minimum account size No minimum
Size of team 4
Funds under advisement \$350 million

To create enduring personal and financial relationships with clients using a formulated and proven process.



Rank 31
Name Simon Growden
Firm Shadforth Financial Group
Location Perth
Years of planning experience 21
Minimum account size \$300,000
Size of team 5
Funds under advisement \$143 million



Rank 32
Name Glenn Peers
Firm Bridges Personal Investment Services
Location Baulkham Hills, NSW
Years of planning experience 14
Minimum account size \$2000
Size of team 4
Funds under advisement \$181 million

To provide proactive advice, outstanding customer service and value for money services that clients understand and appreciate.



Rank 33
Name Glenn Sterrey
Firm Bentleys Wealth Partners
Location Adelaide, SA
Years of planning experience 17
Minimum account size \$500,000
Size of team 5
Funds under advisement \$175 million

To retain and protect the clients' capital, and then to produce above average and benchmark returns on a net after-fee basis.



Rank 34
Name Tim Donohue
Firm PMD Financial Advisers
Location Melbourne
Years of planning experience 30
Minimum account size \$100,000
Size of team 8
Funds under advisement \$500 million

To ensure we do the best for our clients by providing exceptional service on every occasion, offering advice in an easy to understand and professional manner.



Rank 35
Name Aziz Meherali
Firm Elixir Private Wealth
Location Sydney
Years of planning experience 20
Minimum account size \$500,000
Size of team 4
Funds under advisement \$150 million

Integrity, loyalty, care.



Rank 36
Name Craig Butler
Firm Shadforth Financial Group
Location Perth
Years of planning experience 8
Minimum account size No minimum
Size of team 1
Funds under advisement \$154 million

I offer personal financial advice, solutions and services tailored to each client's unique set of circumstances and objectives.



Rank 37
Name Tim Mackay
Firm Quantum Financial
Location Sydney
Years of planning experience 12
Minimum account size No minimum
Size of team 9
Funds under advisement \$313 million

I work with pre-retirees and retirees looking to manage their family's wealth and to fund their dream retirement.



Rank 38
Name David Fleming
Firm BT Advice
Location Bunbury, WA
Years of planning experience 19
Minimum account size No minimum
Size of team 6
Funds under advisement \$203 million



Rank 39
Name Dominic Mulcahy
Firm UNICA Wealth
Location Hobart
Years of planning experience 18
Minimum account size \$200,000
Size of team 12
Funds under advisement \$240 million

We provide a very high level of client-centric service and support through an above-average ratio of staff to clients, and a collaborative, team-oriented and structured approach.



Rank 40
Name Gary Dean
Firm Prosperity Advisers Group
Location Sydney
Years of planning experience 14
Minimum account size \$10,000
Size of team 18
Funds under advisement \$465 million

One team, one plan, smart advice. A multidisciplinary team of experts delivering holistic advice.



Rank 41
Name Linda Clay
Firm Advice
Location Brisbane
Years of planning experience 16
Minimum account size \$212,000
Size of team 68
Funds under advisement \$1.6 billion.

We want to create a better tomorrow for our customers, our communities and our shareholders. To do this we need to establish a culture of help.



Rank 42
Name Patrick Anwandter
Firm Strategy First Financial Planning
Location Brookvale, NSW
Years of planning experience 19
Minimum account size No minimum
Size of team 12
Funds under advisement \$560 million

Providing you with the greatest chance of achieving your preferred future by helping you to make smart financial choices.



Rank 43
Name Peter Crump
Firm ipac South Australia
Location Wayville, SA
Years of planning experience 13
Minimum account size \$400,000
Size of team 3
Funds under advisement \$160 million

My clients are better educated on what matters to their financial situation. With that comes the confidence to make good decisions.



Rank 44
Name Gwyneira Brahma
Firm Brahma Wealth Management
Location Kalgoorlie, WA
Years of planning experience 16
Minimum account size No minimum
Size of team 14
Funds under advisement \$170 million

We aim to give clients clear advice with definite results and to ensure they understand the strategies we have recommended.



Rank 45
Name Jeremy Gillman-Wells
Firm Bravien Financial
Location Yarralumla, ACT
Years of planning experience 16
Minimum account size No minimum
Size of team 12
Funds under advisement \$232 million

By understanding what drives you and what's important in your life, we design the strategies to get your entire financial house in order.



Rank 46
Name Finn Dorney
Firm Shadforth Financial Group
Location Hobart
Years of planning experience 9
Minimum account size No minimum
Size of team 5
Funds under advisement \$110 million



Rank 47
Name Ben Calder
Firm Calder Wealth Management
Location Adelaide
Years of planning experience 22
Minimum account size \$100,000
Size of team 14
Funds under advisement \$196 million

To guide people and their families to live their ideal fullest lives.



Rank 48
Name Bert Dugdale
Firm RI Advice Alderley
Location Brisbane
Years of planning experience 14
Minimum account size \$50,000
Size of team 6
Funds under advisement \$122 million

We provide good, honest, friendly advice, easy to understand and tailored to client's needs.



Rank 49
Name Anne Graham
Firm Story Wealth Management
Location Hawthorn, VIC
Years of planning experience 18
Minimum account size No minimum
Size of team 9
Funds under advisement \$265 million

We give you the confidence to take control of your life and write the next chapter.



Rank 50
Name Liam Shorte
Firm Verante
Location Castle Hill, NSW
Years of planning experience 12
Minimum account size \$200,000
Size of team 8
Funds under advisement \$220 million

We work with professionals and white collar clients who are planning to be financially independent within the next 10 years.

Several firms on the list are subsidiaries of banks or are licensed through interests connected with banks. For example, RetireInvest (RI Advice Alderley) is owned by ANZ; Elixir Private Wealth is a representative of Godfrey Pembroke, a subsidiary of NAB; the BT Advice group is owned by Westpac; while the Brahma, UNICA, Story Wealth and Verante groups operate under licences ultimately controlled by Westpac. Planners may have similar connections with insurers or wealth management groups: the Shadforth group is owned by IOOF. Calder, Catapult, and PMD operate under licences controlled by IOOF. Prosperity, Axios, Bravien, Hillross Macarthur and ipac operate under licences ultimately controlled by AMP.