

**THE DEAL**

in association with  
**BARRON'S**

US financial investment publication Barron's and The Australian's business magazine The Deal present Australia's comprehensive list of financial advisers. The Top 50 Financial Advisers in Australia is based on an exhaustive, national survey. This list offers clients and advisers a unique guide to the leading practitioners in the sector. This package is a joint project between The Australian and Barron's. Both Barron's and The Australian are owned by News Corp.

**THE TOP 10**

Financial Advisers in Australia

**1**

Sue Dahn

FIRM:Pitcher Partners

MIN ACCOUNT SIZE:\$1,000,000

**2**

Garth Hu

FIRM:Morgan Stanley Wealth Management

MIN ACCOUNT SIZE:\$5,000,000

**3**

Scott Carmichael

FIRM:Escala Partners

MIN ACCOUNT SIZE:\$2,500,000

**4**

Charlie Viola

FIRM:Pitcher Partners

MIN ACCOUNT SIZE:\$1,000,000

**5**

Adam Stanley

FIRM:Pitcher Partners

MIN ACCOUNT SIZE:\$1,000,000

**6**

Ben James

FIRM:Escala Partners

MIN ACCOUNT SIZE:\$0

**7**

Mason Allamby

FIRM:Escala Partners

MIN ACCOUNT SIZE:\$1,000,000

**8**

Anita Beckers

FIRM:Macquarie Private Bank

MIN ACCOUNT SIZE:\$1,000,000

**9**

Craig Emanuel

FIRM:Morgan Stanley Wealth Management  
MIN ACCOUNT SIZE:\$1,000,000

10

Matthew Gartrell

FIRM:Macquarie Private Bank

MIN ACCOUNT SIZE:\$1,000,000

## THE LIST

### Australia's Top 50 Financial Advisers 2019

2

1

Sue Dahn

FIRMPitcher Partners

MINIMUM ACCOUNT SIZE\$1,000,000

-

2

Garth Hu

FIRMMorgan Stanley Wealth Management

MINIMUM ACCOUNT SIZE\$5,000,000

2

3

Scott Carmichael

FIRMEscala Partners

MINIMUM ACCOUNT SIZE\$2,500,000

3

4

Charlie Viola

FIRMPitcher Partners

MINIMUM ACCOUNT SIZE\$1,000,000

NEW

5

Adam Stanley

FIRMPitcher Partners

MINIMUM ACCOUNT SIZE\$1,000,000

2

6

Ben James

FIRMEscala Partners

MINIMUM ACCOUNT SIZE\$0

NEW

7

Mason Allamby

FIRMEscala Partners

MINIMUM ACCOUNT SIZE\$1,000,000

NEW

8

Anita Beckers

FIRMMacquarie Private Bank

MINIMUM ACCOUNT SIZE\$1,000,000

-

9

Craig Emanuel  
FIRM Morgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE \$1,000,000  
NEW

**10**

Matthew Gartrell  
FIRM Macquarie Private Bank  
MINIMUM ACCOUNT SIZE \$1,000,000  
NEW

**11**

Charles Moore  
FIRM Koda Capital  
MINIMUM ACCOUNT SIZE \$3,000,000  
NEW

**12**

Bernie Connolly  
FIRM Morgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE \$2,500,000  
NEW

**13**

Peter Dunn  
FIRM Koda Capital  
MINIMUM ACCOUNT SIZE \$3,000,000  
NEW

**14**

Frank Macindoe  
FIRM Koda Capital  
MINIMUM ACCOUNT SIZE \$2,000,000  
NEW

**15**

Chad Brendish  
FIRM Morgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE \$3,000,000  
NEW

**16**

Philip Zhou  
FIRM Macquarie Wealth Management  
MINIMUM ACCOUNT SIZE \$1,000,000  
NEW

**17**

Andrew Cowen  
FIRM Macquarie Private Bank  
MINIMUM ACCOUNT SIZE \$5,000,000  
NEW

**18**

Ben Forrester  
FIRM Macquarie Group  
MINIMUM ACCOUNT SIZE \$5,000,000

**9**

**19**

Paul Alexander Anthony Burgon  
FIRMLipman Burgon & Partners  
MINIMUM ACCOUNT SIZE\$1,500,000

**3**

**20**

Paul Lyons  
FIRMMorgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE\$0

**8**

**21**

Matt Koch  
FIRMMorgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE\$2,000,000

**11**

**22**

David Simon  
FIRMIntegral Private Wealth  
MINIMUM ACCOUNT SIZE\$1,500,000

NEW

**23**

Nick Batrouney  
FIRMMorgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE\$3,000,000

NEW

**24**

Travis Pitt  
FIRMMorgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE\$5,000,000

NEW

**25**

William Douglas  
FIRMKoda Capital  
MINIMUM ACCOUNT SIZE\$3,000,000

**14**

**26**

Claire Mackay  
FIRMQuantum Financial  
MINIMUM ACCOUNT SIZE\$0

**12**

**27**

Tim Mackay  
FIRMQuantum Financial  
MINIMUM ACCOUNT SIZE\$0

NEW

**28**

Mark Bradley  
FIRMMorgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE\$1,000,000

NEW

**29**

Chris Marshall  
FIRM Perpetual Private  
MINIMUM ACCOUNT SIZE \$500,000

NEW

**30**

Sean Abbott  
FIRM Koda Capital  
MINIMUM ACCOUNT SIZE \$4,000,000

**15**

**31**

Neil Heriot  
FIRM Boston Private Wealth  
MINIMUM ACCOUNT SIZE \$500,000

NEW

**32**

Amanda Fong  
FIRM Escala Partners  
MINIMUM ACCOUNT SIZE \$2,000,000

NEW

**33**

Michael Muehlheim  
FIRM Macquarie Private Bank  
MINIMUM ACCOUNT SIZE \$1,000,000

NEW

**34**

Olivia Maragna  
FIRM Aspire Retire  
MINIMUM ACCOUNT SIZE \$0

NEW

**35**

Brett Stene  
FIRM Jacaranda Financial Planning  
MINIMUM ACCOUNT SIZE \$0

NEW

**36**

Paul Brady  
FIRM Brady & Associates Financial Advisers  
MINIMUM ACCOUNT SIZE \$0

NEW

**37**

Matthew Donat  
FIRM Koda Capital  
MINIMUM ACCOUNT SIZE \$3,000,000

NEW

**38**

Steve Triantafilidis  
FIRM Morgan Stanley Wealth Management  
MINIMUM ACCOUNT SIZE \$500,000

NEW

**39**

Marc Smith  
FIRMBT Advice  
MINIMUM ACCOUNT SIZE\$1,000,000

NEW

**40**

Simon Duckett  
FIRMKoda Capital  
MINIMUM ACCOUNT SIZE\$3,000,000

**19**

**41**

Douglas Turek  
FIRMProfessional Wealth  
MINIMUM ACCOUNT SIZE\$1,000,000

**17**

**42**

Mark Minchin  
FIRMMinchin Moore Private Wealth Advisers  
MINIMUM ACCOUNT SIZE\$0

**17**

**43**

Chris Smith  
FIRMVISIS Private Wealth  
MINIMUM ACCOUNT SIZE\$500,000

**17**

**44**

Paul Nicol  
FIRMGFM Wealth Advisory  
MINIMUM ACCOUNT SIZE\$0

NEW

**45**

Hamish Harvey  
FIRMStanford Brown  
MINIMUM ACCOUNT SIZE\$250,000

**28**

**46**

Phillip Gillard  
FIRMShadforth Financial Group  
MINIMUM ACCOUNT SIZE\$0

**24**

**47**

Sally Huynh  
FIRMShadforth Financial Group  
MINIMUM ACCOUNT SIZE\$0

NEW

**48**

Nick Walter  
FIRMMacquarie Wealth Management  
MINIMUM ACCOUNT SIZE\$2,000,000

**15**

**49**

Will Hamilton  
FIRM Hamilton Wealth Management  
MINIMUM ACCOUNT SIZE \$1,500,000

**29**

**50**

Dean Ireland  
FIRM Elston  
MINIMUM ACCOUNT SIZE \$600,000