THE AUSTRALIAN
DEAL
SEPTEMBER 2022
IN ASSOCIATION WITH BARRON'S

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Smart thinking, smart money

TOP 100 FINANCIAL ADVISERS 2022

From left: Cathy Ding, Adam Stanley, Bernie Connolly, Amanda Fong and Charlie Viola

LEADING IN A TIME OF TURMOIL

THE MONEY MAKERS AT THE TOP OF THEIR GAME

BARRON'S
Top 100
Financial Advisers

IT'S ALL ABOUT THE TEAM

The 2022 list reflects structural changes as the sector evolves to meet different client demands. Story by Matt Barthel Illustration by Steven Moore

A TOP 100 LISTING WITH 108 NAMES ON IT? WHAT GIVES?

A lot has changed since venerable US investing magazine Barron's first joined with The Australian to publish financial adviser ratings in 2017.

Most obviously, and perhaps ominously, the number of licensed financial advisers has plummeted from more than 27,959 in 2018 to 16,356 as of the end of last month, according to data compiled by Adviser Ratings.

The exodus is largely the result of advisers failing to meet the more stringent professional requirements introduced in the wake of the Hayne royal commission into banking.

The commission aimed to root out abuses and bad actors in the financial industry and to create an environment of professionalism that would benefit consumers of financial advice. Thus far, the road to that new era of financial advice has been a rocky one, thanks in no small part to a pandemic. At this juncture, though, the evolution of financial advice is nearing a midway point, with the Darwinian shake-out leaving only the fittest advisers still standing and with the industry as a whole reorganising itself around those remaining advisers.

So back to that listing and the 108 names. The Barron's/The Australian top adviser listing this year features its usual 100 ranking spots, with the twist that eight of the advisers head up teams on a coequal basis with a partner.

In these cases, we've listed the names of both coequal partners in the same ranking spot. Like the industry itself, this listing is in a transition towards recognising perhaps the most important development in Australian financial advice: the rising importance of teams.

To get a better understanding of how this transitional period might play out, it can be useful to look at the advisory industry in the US, which Barron's magazine has tracked for almost two decades. The US is far from perfect in its approach to financial advice, of course. Regulation is a mess, with independent advisers held to a different regulatory standard than the so-called wirehouse advisers employed by large firms such as Morgan Stanley and Merrill Lynch.

Further, attempts at implementing an industry-wide fiduciary standard went into extended hibernation a couple of years back, delaying a mandated requirement that advisers always act in the best interest of their clients.

Still, the industry has made major strides in its quest to acquire the trust of US investors and to be recognised as a serious, ethical profession. According to the Certified Financial Planner Board, a professional-standards organisation that administers the prestigious CFP certification to advisers, consumer use of US financial advisers stood at about 28 per cent in 2010. Today that number has risen to about 35 per cent.

The mechanism driving these improvements? The advisory team.

Historically, the US advisory business has been driven by the solo practitioner – a lone-wolf type who shouldered a wide range of responsibilities, from investing to relationship management and new-client acquisition. In the years following the 2008 financial crisis, the best advisers awakened to the difficulties inherent in a solo practice. The increasing complexity of the business called for specialisation in areas such as regulatory compliance, investing and client service. And so began a movement that continues today, in which the best advisers at both independent and wirehouse firms are adding personnel specifically to address the emerging challenges and opportunities in their business.

A DARWINIAN SHAKE-OUT IS LEAVING ONLY THE FITTEST ADVISERS STILL STANDING

If you're an adviser, there's plenty of evidence that building a strong team is good for business. To take one example: the average amount of client assets managed by one of the Barron's Top 100 Private Wealth Management Teams rose 79 per cent from 2020 to 2022. In aggregate, the Top 100 Teams in 2022 manage $US590.8bn in client assets, compared with $US332.4bn in 2020.

If you're an advisory client, the emergence of teams is likewise good news. The teams in the Barron's Top 100 reaped outsized growth because investors in a pandemic craved stability and a high level of professionalism. Well-constructed teams were best positioned to deliver those things.

The Australian advisory business differs from the US in a number of important ways, but two things they have in common are an ongoing need to inspire trust in clients and to address the increasingly complex demands of a fast-evolving business. Advisory teams are likely a large part of the future of the Australian advisory industry. We've taken a small step towards acknowledging this fact in recognising a handful of partnerships in this year's ranking. We look forward to expanding our coverage of this movement in our future rankings.

Matt Barthel is executive editor in the Dow Jones Wealth and Asset Management group, which produces the Barron's adviser rankings in partnership with The Australian.

TOP OF THEIR GAME IN 2022

It's been a tough year for the finanical advice sector as many left an industry that continues to face change and as a new government looks at issues of equity and education. The Top 100 Financial Advisers in Australia is a guide to the work of leading individuals and companies in a vital Australian profession. By Helen Trinca

Garth Hu (1), Andrew Dunbar (2) and Andrew Cowen (3)

The big advisory firms dominate the top ranks of this year's Top 100 Financial Advisers, with seven out of the top 10 spots taken by people working for Morgan Stanley Wealth Management, Pitcher Partners and Macquarie Private Bank.

The winner – for the third year in a row – is Morgan Stanley's Garth Hu, who heads a team of 11 and has $3.2bn under management.

The sixth annual list reveals a consolidation of the market at the top end where many advisers mandate that investors have at least between $1 million to $5 million to invest. It's a trend that has increased during the Covid-19 years, says Matt Barthel, executive editor, Dow Jones Wealth and Asset Management, which conducts the ranking project.

"What's happened is that the rich are getting richer, and the people who work with very wealthy people are getting better and better at it," he says. "They tend to be the people who are creating big teams with a wide array of abilities. It impossible to overstate how valuable it was going into the pandemic for those advisers who had their teams and processes set up.

"They were always set up to grow because they're really good at what they do. So when a crisis happened, they were in a position to just react while others were thrown into disarray. The pandemic accelerated what was already happening, which is that people who build really good teams were in a really good position to serve people well. The people who were really good at what they did just reaped outsized rewards."

He says the list assesses advisers on a range of quality measures such as time in the industry; the regulatory record of advisers, size of the team and the ability to service clients.

"There's a whole bunch of quality measures that we use and the best people in these rankings max out the quality measures, and then it becomes an asset and revenue race," he says.

"Once you get to the point where everybody's maxed out their quality measures, the people who manage big money rise to the top."

He says people like Hu, like those who consistently top the US list, have "defined their value proposition, refined the way they're attacking new business to such an extent that they're outpacing everybody and are turning themselves into a LeBron James type person...These are superstars surrounded by a supporting cast who are all stars in their own right."

Barron's decision, for the first time, to ranks partners together means that there are 108 people listed in 100 spots, and the No. 9 rank is shared by Bernie Connolly and Patrick Regan of Morgan Stanley who head a team on nine people. The duo are among eight "partner pairs" on the list, a result of Barron's belief that even though the partners submit individual entries to the ranking, it is impossible to untangle their operations.

Barthel says: "This is happening in the States as well. These 50-50 partnerships are very specifically a situation where two people essentially operate as one and they are so intertwined that the appropriate ranking is shared."

He says there is a trend to develop advisory teams of three or four or more people and the industry is in the midst of an evolution of how clients are served.

He flagged a possible change in next year's list: "I think the smart thing to do is just to rank teams next year, which is a much easier enterprise and also covers a lot more people."

But he warned that with a shrinking workforce, the ability to build a team would be stretched: "Staffing and populating your team is a big issue in the States but it's going to be an even bigger issue here."

Apart from Connolly – the only woman in the Top 10 – the list includes 16 other women advisers, with the next highest ranked Amanda Fong of Escala Partners has who moved to number 14, up from 20 last year. The number of women on the list is on a par with last year and in roughly the same proportion as in the US. Here, three women are on the list as "partner pairs" – Connolly; Anita Beckers (22) of Macquarie Private Bank; and Claire Mackay (69) of Quantum Financial.

Barthel notes the male dominance in the industry here and in the US and says: "There have been very specific, well-funded efforts to get more women into the industry in the States, and to increase their position in the ranking, but it has not budged the numbers."

The relative lack of women is surprising, given that in so many ways, they are seen as having the empathy and EQ so useful in advisers. That they are clustered at the lower end of the Australian list could also be due to the fact that for various reasons many run smaller operations with less funds.

One feature of the 2022 list is that there are 22 new arrivals, suggesting there is still considerable dynamism in the sector.

Says Barthel: "It's a testament to who's stepping up (to fill the gaps because of the exit of many advisers in recent years).

"If you've done a very good job in the pandemic years and survived you are being rewarded. It's a really great time, if you're a good adviser."

THE LIST

The Top 100 Financial Advisers list is a collaboration between The Australian and its corporate cousin, Barron's, a 101-year-old American magazine for investors.

The ranking is both a guide to consumers looking for an adviser and a scorecard that advisers can use to measure themselves against one another. The formula used to calculate the ranking is rooted in three general categories: client assets managed by the adviser, fees and revenue generated by their business, and the quality of the adviser's business.

The asset and revenue numbers are proxies for client satisfaction (it's our contention that there's no better sign of a client's opinion than the amount of money entrusted to an adviser and the fees the client is comfortable paying). The quality-of-practice category includes a number of factors including an adviser's experience, credentials and client-service resources.

The listing is based on a survey of 55 questions.

Matt Barthel
Executive editor, Dow Jones Wealth and Asset Management

1. Garth Hu
2021 rank: 1
Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 15
Minimum account size: $5,000,000
Size of team: 11
Funds under advisement: $3,200,000,000

2. Andrew Dunbar
2021 rank: 3
Apt Wealth Partners
Melbourne, VIC
Years of planning experience: 17
Minimum account size: no minimum
Size of team: 75
Funds under advisement: $2,450,000,000

3. Andrew Cowen
2021 rank: 8
Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 15
Minimum account size: $5,000,000
Size of team: 12
Funds under advisement: $2,582,000,000

4. Charlie Viola
2021 rank: 10
Pitcher Partners Sydney Wealth Management
Sydney, NSW
Years of planning experience: 23
Minimum account size: no minimum
Size of team: 23
Funds under advisement: $3,200,000,000

5. Adam Stanley
2021 rank: 12
Pitcher Partners Investment Services
Docklands, VIC
Years of planning experience: 20
Minimum account size: $1,000,000
Size of team: 62
Funds under advisement: $5,900,000,000

6. Mathew Cassidy
2021 rank: 7
Partners Wealth Group
Melbourne, VIC
Years of planning experience: 21
Minimum account size: $1,000,000
Size of team: 50
Funds under advisement: $2,200,000,000

7. Campbell Vidgen
2021 rank: 4
Macquarie Private Bank
Sydney, NSW
Years of planning experience: 13
Minimum account size: $5,000,000
Size of team: 15
Funds under advisement: $3,100,000,000

8. Frank Macindoe
2021 rank: 9
Koda Capital
Sydney, NSW
Years of planning experience: 20
Minimum account size: $3,000,000
Size of team: 4
Funds under advisement: $1,190,000,000

9. Bernie Connolly (joint)
2021 rank: 27
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 16
Minimum account size: $2,000,000
Size of team: 9
Funds under advisement: $2,080,000,000

9. Patrick Regan (joint)
2021 rank: 28
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 15
Minimum account size: $2,000,000
Size of team: 9
Funds under advisement: $2,080,000,000

10. Ben James
2021 rank: 11
Escala Partners
Melbourne, VIC
Years of planning experience: 24
Minimum account size: $5,000,000
Size of team: 7
Funds under advisement: $1,250,000,000

11. Daniel Tome
2021 rank: 19
Perpetual Private
Melbourne, VIC
Years of planning experience: 27
Minimum account size: $500,000
Size of team: 6
Funds under advisement: $1,355,200,000

12. Ben Forrester
2021 rank: 31
Macquarie Private Bank
Sydney, NSW
Years of planning experience: 13
Minimum account size: $5,000,000
Size of team: 10
Funds under advisement: $1,463,680,434

13. Paul Burgon
2021 rank: 15
Lipman Burgon & Partners
Sydney, NSW
Years of planning experience: 17
Minimum account size: $5,000,000
Size of team: 24
Funds under advisement: $1,800,000,000

14. Amanda Fong
2021 rank: 20
Escala Partners
Melbourne, VIC
Years of planning experience: 21
Minimum account size: $1,000,000
Size of team: 5
Funds under advisement: $1,400,000,000

15. Mason Allamby (joint)
2021 rank: 5
Escala Partners
Melbourne, VIC
Years of planning experience: 21
Minimum account size: $2,500,000
Size of team: 5
Funds under advisement: $875,000,000

15. Steve Collins (joint)
2021 rank: 6
Escala Partners
Melbourne, VIC
Years of planning experience: 18
Minimum account size: $2,500,000
Size of team: 5
Funds under advisement: $875,000,000

16. James McGregor
2021 rank: 24
Apt Wealth Partners
Sydney, NSW
Years of planning experience: 30
Minimum account size: no minimum
Size of team: 75
Funds under advisement: $2,450,000,000

17. Paul Sealey (joint)
2021 rank: NR
Escala Partners
Melbourne, VIC
Years of planning experience: 15
Minimum account size: $5,000,000
Size of team: 8
Funds under advisement: $840,830,371

17. Jonathan Vickers-Willis (joint)
2021 rank: NR
Escala Partners
Melbourne, VIC
Years of planning experience: 9
Minimum account size: $5,000,000
Size of team: 8
Funds under advisement: $840,830,371

18. Heath McLaren
2021 rank: 17
Macquarie Private Bank
Manly, NSW
Years of planning experience: 23
Minimum account size: $5,000,000
Size of team: 7
Funds under advisement: $1,750,000,000

19. Charles Moore (joint)
2021 rank: 14
Koda Capital
Sydney, NSW
Years of planning experience: 17
Minimum account size: $5,000,000
Size of team: 4
Funds under advisement: $1,200,000,000

19. Peter Dunn (joint)
2021 rank: 16
Koda Capital
Sydney, NSW
Years of planning experience: 7
Minimum account size: $5,000,000
Size of team: 4
Funds under advisement: $1,200,000,000

20. Michael Ogg (joint)
2021 rank: 67
Providence Wealth Advisory Group
Sydney, NSW
Years of planning experience: 22
Minimum account size: $5,000,000
Size of team: 18
Funds under advisement: $1,200,000,000

20. Grant Patterson (joint)
2021 rank: 68
Providence Wealth Advisory Group
Sydney, NSW
Years of planning experience: 21
Minimum account size: $5,000,000
Size of team: 18
Funds under advisement: $1,200,000,000

21. Scott Girdlestone
2021 rank: 37
William Buck Health Advisors
Sydney, NSW
Years of planning experience: 20
Minimum account size: No minimum
Size of team: 18
Funds under advisement: $1,352,000,000

22. Anita Beckers (joint)
2021 rank: 21
Macquarie Private Bank
Broadbeach, QLD
Years of planning experience: 25
Minimum account size: $1,000,000
Size of team: 6
Funds under advisement: $1,200,000,000

22. Matthew Gartrell (joint)
2021 rank: 23
Macquarie Private Bank
Broadbeach, QLD
Years of planning experience: 14
Minimum account size: $1,000,000
Size of team: 6
Funds under advisement: $1,200,000,000

23. Matthew Donat
2021 rank: 43
Koda Capital
Melbourne, VIC
Years of planning experience: 12
Minimum account size: $5,000,000
Size of team: 4
Funds under advisement: $1,200,000,000

24. Chad Brendish
2021 rank: 13
Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 36
Minimum account size: $3,000,000
Size of team: 9
Funds under advisement: $1,850,000,000

25. Cathy Ding
2021 rank: 39
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 5
Minimum account size: $5,000,000
Size of team: 11
Funds under advisement: $3,200,000,000

26. Chris Smith
2021 rank: 42
VISIS Private Wealth
Brisbane, QLD
Years of planning experience: 22
Minimum account size: $500,000
Size of team: 10
Funds under advisement: $801,614,934

27. Matt Koch
2021 rank: 36
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 37
Minimum account size: $5,000,000
Size of team: 5
Funds under advisement: $2,480,000,000

28. David Clark
2021 rank: 56
Koda Capital
Sydney, NSW
Years of planning experience: 19
Minimum account size: $3,000,000
Size of team: 3
Funds under advisement: $870,737,907

29. David Burgess (joint)
2021 rank: 60
Morgan Stanley Wealth Management
Adelaide, SA
Years of planning experience: 24
Minimum account size: $1,500,000
Size of team: 4
Funds under advisement: $1,250,000,000

29. Sam Saunders (joint)
2021 rank: NR
Morgan Stanley Wealth Management
Adelaide, SA
Years of planning experience: 14
Minimum account size: $1,500,000
Size of team: 4
Funds under advisement: $1,250,000,000

30. Christopher Bell
2021 rank: NR
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 37
Minimum account size: $5,000,000
Size of team: 5
Funds under advisement: $2,480,000,000

31. Paul Lyons
2021 rank: 38
Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 27
Minimum account size: no minimum
Size of team: 3
Funds under advisement: $1,000,000,000

32. Andrew Rochester
2021 rank: 32
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 28
Minimum account size: $5,000,000
Size of team: 3
Funds under advisement: $1,265,000,000

33. Ben Andreou
2021 rank: 76
Koda Capital
Sydney, NSW
Years of planning experience: 7
Minimum account size: $3,000,000
Size of team: 2
Funds under advisement: $951,000,000

34. Mark Pollasky
2021 rank: NR
Koda Capital
Sydney, NSW
Years of planning experience: 27
Minimum account size: $5,000,000
Size of team: 4
Funds under advisement: $900,000,000

35. David Robinson
2021 rank: NR
Morgan Stanley Wealth Management
Adelaide, SA
Years of planning experience: 32
Minimum account size: $1,000,000
Size of team: 4
Funds under advisement: $1,600,000,000

36. Kellie Davidson
2021 rank: 33
Pitcher Partners Investment Services
Docklands, VIC
Years of planning experience: 19
Minimum account size: $1,000,000
Size of team: 62
Funds under advisement: $5,900,000,000

37. Brett Stene
2021 rank: 45
Jacaranda Financial Planning
Sydney, NSW
Years of planning experience: 18
Minimum account size: $500,000
Size of team: 28
Funds under advisement: $1,000,000,000

38. Nick Batrouney
2021 rank: 25
Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 28
Minimum account size: $3,000,000
Size of team: 9
Funds under advisement: $1,830,000,000

39. Neil Heriot
2021 rank: 34
Boston Private Wealth
Sanctuary Cove, QLD
Years of planning experience: 33
Minimum account size: $1,000,000
Size of team: 8
Funds under advisement: $980,000,000

40. Mark Minchin
2021 rank: 51
Minchin Moore Private Wealth Advisers
Mosman, NSW
Years of planning experience: 19
Minimum account size: $10,000,000
Size of team: 45
Funds under advisement: $2,400,000,000

41. Will Hamilton
2021 rank: 86
Hamilton Wealth Partners
Glen Iris, VIC
Years of planning experience: 36
Minimum account size: $2,500,000
Size of team: 9
Funds under advisement: $810,000,000

42. David Bedford
2021 rank: NR
Pitcher Partners Investment Services
Docklands, VIC
Years of planning experience: 21
Minimum account size: $1,000,000
Size of team: 62
Funds under advisement: $5,900,000,000

43. Peter Seldon
2021 rank: NR
Morgan Stanley Wealth Management
Brisbane, QLD
Years of planning experience: 21
Minimum account size: $500,000
Size of team: 4
Funds under advisement: $850,000,000

44. Phillip Gillard
2021 rank: 89
Shadforth Financial Group
North Sydney, NSW
Years of planning experience: 23
Minimum account size: $500,000
Size of team: 8
Funds under advisement: $1,059,866,689

45. Steve Triantafilidis
2021 rank: 44
Morgan Stanley Wealth Management
Adelaide, SA
Years of planning experience: 36
Minimum account size: $1,000,000
Size of team: 7
Funds under advisement: $880,000,000

46. David Simon
2021 rank: 29
Integral Private Wealth
Sydney, NSW
Years of planning experience: 21
Minimum account size: $1,500,000
Size of team: 30
Funds under advisement: $1,400,000,000

47. Mark Bradley
2021 rank: 35
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 30
Minimum account size: $2,500,000
Size of team: 5
Funds under advisement: $700,000,000

48. Paul Nicol
2021 rank: 46
GFM Wealth Advisory
Camberwell, VIC
Years of planning experience: 22
Minimum account size: $1,000,000
Size of team: 21
Funds under advisement: $1,975,000,000

49. Tom Meagher
2021 rank: NR
Escala Partners
Sydney, NSW
Years of planning experience: 35
Minimum account size: $1,000,000
Size of team: 5
Funds under advisement: $500,000,000

50. Simon Mills
2021 rank: NR
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 24
Minimum account size: $5,000,000
Size of team: 2
Funds under advisement: $600,000,000

51. Matthew Owen
2021 rank: 48
Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 15
Minimum account size: $5,000,000
Size of team: 12
Funds under advisement: $2,500,000,00

52. Sean Abbott
2021 rank: 50
Koda Capital
Sydney, NSW
Years of planning experience: 24
Minimum account size: $5,000,000
Size of team: 3
Funds under advisement: $500,000,000

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53. Dave Haydon
2021 rank: NR
[redacted]
Cairns, QLD
Years of planning experience: 9
Minimum account size: $500,000
Size of team: 10
Funds under advisement: $1,000,000,000

54. Mark Palmer
2021 rank: 63
Morgan Stanley Wealth Management
Perth, WA
Years of planning experience: 23
Minimum account size: $1,000,000
Size of team: 10
Funds under advisement: $1,565,000,000

55. Simon Duckett
2021 rank: 75
Koda Capital
Sydney, NSW
Years of planning experience: 23
Minimum account size: $3,000,000
Size of team: 4
Funds under advisement: $677,000,000

56. Liz Wheatley
2021 rank: 93
Perpetual Private
Sydney, NSW
Years of planning experience: 5
Minimum account size: $1,000,000
Size of team: 5
Funds under advisement: $2,220,000,000

57. Adam Griffiths
2021 rank: NR
Morgan Stanley Wealth Management
Adelaide, SA
Years of planning experience: 21
Minimum account size: $1,000,000
Size of team: 2
Funds under advisement: $623,498,487

58. Neil Kendall
2021 rank: 92
Tupicoffs - The Independent Financial Planners
Brisbane, QLD
Years of planning experience: 20
Minimum account size: $3,000,000
Size of team: 26
Funds under advisement: $1,912,937,147

59. James Wortley
2021 rank: 52
Enlightened Financial Solutions
Mackay, QLD
Years of planning experience: 24
Minimum account size: no minimum
Size of team: 16
Funds under advisement: $400,000,000

60. Sue Dahn
2021 rank: 22
Pitcher Partners Investment Services
Docklands, VIC
Years of planning experience: 24
Minimum account size: $1,000,000
Size of team: 62
Funds under advisement: $5,900,000,000

61. Scarlet Fung
2021 rank: 77
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 22
Minimum account size: $1,500,000
Size of team: 4
Funds under advisement: $750,000,000

62. Olivia Maragna
2021 rank: 57
Aspire Retire
Brisbane, QLD
Years of planning experience: 19
Minimum account size: no minimum
Size of team: 13
Funds under advisement: $380,000,000

63. Mark Vignaroli
2021 rank: 72
Perpetual Private
Melbourne, VIC
Years of planning experience: 26
Minimum account size: $500,000
Size of team: 5
Funds under advisement: $1,075,000,000

64. Sally Huynh
2021 rank: 94
Shadforth Financial Group
Brisbane, QLD
Years of planning experience: 19
Minimum account size: $500,000
Size of team: 5
Funds under advisement: $599,283,596

65. David Raits
2021 rank: NR
Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 27
Minimum account size: $500,000
Size of team: 6
Funds under advisement: $697,469,617

66. Hamish Harvey
2021 rank: 62
Stanford Brown
North Sydney, NSW
Years of planning experience: 15
Minimum account size: $1,000,000
Size of team: 6
Funds under advisement: $810,000,000

67. Hugh Robertson
2021 rank: NR
Centaur Financial Services
Palm Beach, QLD
Years of planning experience: 18
Minimum account size: $500,000
Size of team: 11
Funds under advisement: $975,000,000

68. Amanda Lee
2021 rank: 87
Stewart Brown Advisory
Chatswood, NSW
Years of planning experience: 18
Minimum account size: $500,000
Size of team: 7
Funds under advisement: $450,000,000

69. Tim Mackay (joint)
2021 rank: 69
Quantum Financial
Sydney, NSW
Years of planning experience: 17
Minimum account size: no minimum
Size of team: 12
Funds under advisement: $469,581,021

69. Claire Mackay (joint)
2021 rank: 70
Quantum Financial
Sydney, NSW
Years of planning experience: 13
Minimum account size: no minimum
Size of team: 12
Funds under advisement: $469,581,021

70. Simon Curtain
2021 rank: 64
Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 6
Minimum account size: $1,000,000
Size of team: 6
Funds under advisement: $1,600,000,000

71. Stephen Shostak
2021 rank: 98
Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 21
Minimum account size: $5,000,000
Size of team: 13
Funds under advisement: $2,700,000,000

72. Marisa Broome
2021 rank: 74
wealthadvice
Balmain, NSW
Years of planning experience: 24
Minimum account size: no minimum
Size of team: 4
Funds under advisement: $975,000,000

73. Kate Golder
2021 rank: 47
Alteris Financial Group
Brisbane, QLD
Years of planning experience: 19
Minimum account size: $1,000,000
Size of team: 16
Funds under advisement: $1,500,000,000

74. Lynda McKie
2021 rank: 40
Elston Private Wealth
Fortitude Valley, QLD
Years of planning experience: 33
Minimum account size: $1,000,000
Size of team: 40
Funds under advisement: $350,000,000

75. Joseph Smith
2021 rank: 90
Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 4
Minimum account size: $5,000,000
Size of team: 13
Funds under advisement: $2,900,000,000

76. Douglas Turek
2021 rank: 85
Minchin Moore Private Wealth Advisers
Mosman, NSW
Years of planning experience: 17
Minimum account size: $1,000,000
Size of team: 4
Funds under advisement: $550,000,000

77. Steve Melling
2021 rank: 81
Paul Melling Retirement Planning
Heidelberg, VIC
Years of planning experience: 18
Minimum account size: $500,000
Size of team: 16
Funds under advisement: $510,000,000

78. Campbell Sorell
2021 rank: 88
Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 21
Minimum account size: $500,000
Size of team: 5
Funds under advisement: $615,671,714

79. Ty Cockle
2021 rank: 53
Financial Foundations Australia
Dandenong, VIC
Years of planning experience: 16
Minimum account size: no minimum
Size of team: 14
Funds under advisement: $1,138,000,000

80. David Ross-Edwards
2021 rank: 84
Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 29
Minimum account size: $1,750,000
Size of team: 9
Funds under advisement: $535,000,000

81. Philip Davison
2021 rank: 100
Shadforth Financial Group
Perth, WA
Years of planning experience: 18
Minimum account size: $500,000
Size of team: 6
Funds under advisement: $35,000,000

82. Paul Brady
2021 rank: 59
Brady & Associates Financial Advisers
Sydney, NSW
Years of planning experience: 33
Minimum account size: no minimum
Size of team: 10
Funds under advisement: $660,000,000

83. Peter Leggett
2021 rank: NR
Arrow Private Wealth
Ivanhoe East, VIC
Years of planning experience: 38
Minimum account size: $1,250,000
Size of team: 9
Funds under advisement: $384,000,000

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84. Michael Muehlheim
2021 rank: 49
Macquarie Private Bank
Sydney, NSW
Years of planning experience: 23
Minimum account size: $5,000,000
Size of team: 6
Funds under advisement: $730,000,000

85. Andrew Hudson
2021 rank: 78
Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 15
Minimum account size: $1,000,000
Size of team: 4
Funds under advisement: $750,000,000

86. Nathan Lear
2021 rank: 65
Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 11
Minimum account size: $1,000,000
Size of team: 6
Funds under advisement: $1,600,000,000

87. Simon Growden
2021 rank: 82
Shadforth Financial Group
Perth, WA
Years of planning experience: 26
Minimum account size: $500,000
Size of team: 5
Funds under advisement: $591,310,046

88. Jamie Cockerill
2021 rank: 61
Perpetual Private
Sydney, NSW
Years of planning experience: 22
Minimum account size: no minimum
Size of team: 5
Funds under advisement: $2,500,000,000

89. Glenn,Fairbairn
2021 rank: 95
Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 16
Minimum account size: $1,000,000
Size of team: 17
Funds under advisement: $1,575,000,000

90. Stuart Beattie
2021 rank: 66
Morgan Stanley Wealth Management
Perth, WA
Years of planning experience: 27
Minimum account size: $1,000,000
Size of team: 10
Funds under advisement: $1,565,000,000

91. Sarah Robinson
2021 rank: 96
Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 29
Minimum account size: $1,000,000
Size of team: 7
Funds under advisement: $772,200,000

92. Arjang Taylor
2021 rank: 73
Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 17
Minimum account size: $3,000,000
Size of team: 9
Funds under advisement: $1,830,000,000

93. Paul Ashworth
2021 rank: 91
Cameron Harrison Private
Melbourne, VIC
Years of planning experience: 26
Minimum account size: $1,000,000
Size of team: 12
Funds under advisement: $955,210,472

94. Sam Stillone
2021 rank: NR
Insight Private Wealth
Sydney, NSW
Years of planning experience: 25
Minimum account size: $500,000
Size of team: 5
Funds under advisement: $340,000,000

95. Andrew Pidgeon
2021 rank: NR
Shadforth Financial Group
Perth, WA
Years of planning experience: 18
Minimum account size: $500,000
Size of team: 6
Funds under advisement: $714,026,120

96. Andrew Harrison
2021 rank: NR
Shadforth Financial Group
North Sydney, NSW
Years of planning experience: 26
Minimum account size: $500,000
Size of team: 6
Funds under advisement: $790,718,082

97. Luke Rathborne
2021 rank: NR
Fortitude Private Wealth
Sydney, NSW
Years of planning experience: 17
Minimum account size: no minimum
Size of team: 9
Funds under advisement: $375,000,000

98. Belinda von Knoll
2021 rank: NR
Shadforth Financial Group
Perth, WA
Years of planning experience: 22
Minimum account size: $500,000
Size of team: 9
Funds under advisement: $724,257,630

99. Robert Woodford
2021 rank: NR
Perpetual Private
Sydney, NSW
Years of planning experience: 7
Minimum account size: $3,000,000
Size of team: 7
Funds under advisement: $750,000,000

100. Chris Morcom
2021 rank: NR
Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 22
Minimum account size: $1,500,000
Size of team: 50
Funds under advisement: $1,654,940,343