

THE AUSTRALIAN

THE LIST

NOVEMBER 20, 2025

BARRON'S

TOP 150 FINANCIAL
ADVISERS 2025



MAKING MONEY

IN THE AGE OF AI



COOL CASH

Why your kids love talking finance

WINNING WAYS

Liz Ellis wants your dollars

CRYPTO CURRENCIES

Jury still out on virtual investments

From left: Ben Kohn, Kellie Davidson, Robert Hand,
Andrew Dunbar, Farren Williams and Mathew Cassidy

BARRON'S

TOP 150 FINANCIAL ADVISERS 2025

The List

It's all changed at the top of the financial advice industry: this year's Top 150 list has produced a new number one for the first time since 2020. Garth Hu, the Morgan Stanley Wealth Management adviser who topped the list for five years in a row has made way for Mathew Cassidy of the Partners Wealth Group.

Cassidy started his career in Perth before later working in Dublin, London and New York. After a spell with ANZ wealth management, he started the Partners Wealth business in 2003.

Whether Cassidy can match Hu's golden run at the top of the list remains to be seen, but he would be pleased his homegrown operation now has three other advisers dotted across the rankings.

In fact, Hu and his long-time Morgan Stanley colleague, Cathy Ding, are nowhere to be seen on this year's list because they are setting up a new independent wealth advisory operation, reportedly named Glory House. The absence of Ding from this year's list also created a vacancy for the top female adviser spot, which has been taken by Kellie Davidson of Pitcher Partners at number 24.

Morgan Stanley, with 18 spots, remains the best-known of the global wealth managers on the list.

However, it is the Shadforth Financial Group that has come to seriously dominate Barron's listing. This offshoot of the ASX-listed Insignia group now holds more than a quarter of all spots, with 27.

Shadforth CEO Terry Dillon announced earlier this year he wants Shadforth to double in size from about 100 advisers to more than 200 over a three-year timetable. It's a strategy that will also include major technology changes.

Meanwhile, the very top shelf of the advice sector remains in the grip of Macquarie Private Bank, which takes out three spots in the top 20. Shadforth appears in the rankings at number 23, where you will find Phillip Gillard from the group's North Sydney office. Inside the top five, alongside Cassidy, are list veterans Andrew Dunbar of Apt Wealth Partners, Scott Carmichael of

Escala Partners and Paul Burgon of Lipman Burgon & Partners. Joining this elite group is Robert Hand of the Partners Wealth Group, who moves from number six last year to number five in 2025.

Also inside the top 10 is Charlie Viola, the adviser who lit the fuse for new wealth management start-ups when he recently broke with Pitcher Partners to create Viola Private Wealth. Viola is listed this year at number seven. As Viola says: "The best thing about becoming a new independent operator is that you get to create your own culture, and you get to tell the market exactly who you are. Inside big investment banks, often they are not allowed to go out and talk to the market."

As Viola sees it, the upper end of the adviser sector is now a bustling hothouse with lots of investment interest. "Across this market, there are more people who need advice and fewer people who are doing it," he says. "Private equity groups are all over this sector wanting to go deeper and harder into the industry."

James Kirby

The Top 150 Financial Advisers list is a collaboration between The Australian and its corporate cousin Barron's. The ranking is a guide to consumers seeking an adviser and a scorecard the professionals can use as a benchmark. The formula used to calculate the ranking is based on 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 Listing is based on 60 questions.

*Funds under advisement is based on the team FUA

**wholesale adviser, not required to be registered with ASIC

1. Mathew Cassidy

Partners Wealth Group
Melbourne, VIC
Years of planning experience: 24
Minimum account size: \$5,000,000
Size of team: 146
Funds under advisement: \$ 5,639,410,995

2. Andrew Dunbar

Apt Wealth Partners
Melbourne, VIC
Years of planning experience: 20
Minimum account size: No minimum
Size of team: 79
Funds under advisement: \$3,394,943,539

3. Scott Carmichael

Escala Partners
Melbourne, VIC
Years of planning experience: 27
Minimum account size: \$7,500,000
Size of team: 8
Funds under advisement: \$2,533,407,466

4. Paul Burgon

Lipman Burgon & Partners
Sydney, NSW
Years of planning experience: 20
Minimum account size: \$5,000,000
Size of team: 32
Funds under advisement: \$3,100,000,000

5. Robert Hand

Partners Wealth Group
Melbourne, VIC
Years of planning experience: 15
Minimum account size: \$2,500,000
Size of team: 146
Funds under advisement: \$5,639,410,995

6. Campbell Vidgen

Macquarie Private Bank
Sydney, NSW
Years of planning experience: 17
Minimum account size: \$5,000,000
Size of team: 12
Funds under advisement: \$2,718,689,941

7. Charlie Viola

Viola Private Wealth
Sydney, NSW
Years of planning experience: 26
Minimum account size: \$3,500,000
Size of team: 7
Funds under advisement: \$2,652,451,000

8. Benjamin Kohn

Focus Partners Australia | Link Financial Services
Caulfield North, VIC
Years of planning experience: 25
Minimum account size: \$2,000,000
Size of team: 12
Funds under advisement: \$3,750,000,000

9. Andrew Cowen

Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 18
Minimum account size: \$5,000,000
Size of team: 16
Funds under advisement: \$4,300,000,000

10. Frank Macindoe *

Koda Capital
Sydney, NSW
Years of planning experience: 23
Minimum account size: \$3,000,000
Size of team: 6
Funds under advisement: \$1,834,000,000

11. Matthew Donat

Koda Capital
Melbourne, VIC
Years of planning experience: 15
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$2,200,000,000

12. David Bedford

Pitcher Partners
Docklands, VIC
Years of planning experience: 24
Minimum account size: \$1,000,000
Size of team: 65
Funds under advisement: \$8,030,508,426

13. Chris Smith

VISIS Private Wealth
Brisbane, QLD
Years of planning experience: 26
Minimum account size: \$1,000,000
Size of team: 12
Funds under advisement: \$1,260,000,000

14. Adam Stanley

Pitcher Partners
Docklands, VIC
Years of planning experience: 24
Minimum account size: \$1,000,000
Size of team: 65
Funds under advisement: \$8,030,508,426

15. Daniel Tome

Perpetual Private
Melbourne, VIC
Years of planning experience: 31
Minimum account size: \$500,000
Size of team: 7
Funds under advisement: \$1,709,421,304

16. Chad Brendish

Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 39
Minimum account size: \$3,000,000
Size of team: 10
Funds under advisement: \$3,103,500,000

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TOP 150 FINANCIAL ADVISERS 2025

17. Ben James

Escala Partners
Melbourne, VIC
Years of planning experience: 28
Minimum account size: \$5,000,000
Size of team: 6
Funds under advisement: \$1,800,000,000

18. Tim Eustace

Mercury Private
Sydney, NSW
Years of planning experience: 36
Minimum account size: \$3,000,000
Size of team: 26
Funds under advisement: \$1,250,003,489

19. Ben Forrester

Macquarie Private Bank
Sydney, NSW
Years of planning experience: 16
Minimum account size: \$2,500,000
Size of team: 13
Funds under advisement: \$4,191,418,318

20. Bernie (Bernadette) Connolly

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 19
Minimum account size: \$5,000,000
Size of team: 13
Funds under advisement: \$3,154,000,000

20. Patrick Regan

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 19
Minimum account size: \$5,000,000
Size of team: 13
Funds under advisement: \$3,154,000,000

21. Jamie Cockerill

Perpetual Private
Sydney, NSW
Years of planning experience: 25
Minimum account size: \$1,000,000
Size of team: 6
Funds under advisement: \$2,688,000,000

22. Matthew Smith

Altus Financial
Sydney, NSW
Years of planning experience: 22
Minimum account size: \$500,000
Size of team: 8
Funds under advisement: \$5,643,816,969

23. Phillip Gillard

Shadforth Financial Group
North Sydney, NSW
Years of planning experience: 29
Minimum account size: No minimum
Size of team: 8
Funds under advisement: \$1,899,466,922

24. Kellie Davidson

Pitcher Partners
Docklands, VIC
Years of planning experience: 22
Minimum account size: \$1,000,000
Size of team: 65
Funds under advisement: \$8,030,508,426

25. Scott Girdlestone

William Buck Wealth Advisors
Sydney, NSW
Years of planning experience: 24
Minimum account size: No minimum
Size of team: 23
Funds under advisement: \$2,149,744,000

26. Ashley Davis

Shadforth Financial Group
Brisbane, QLD
Years of planning experience: 25
Minimum account size: No minimum
Size of team: 12
Funds under advisement: \$1,829,377,530

27. Troy Theobald

RFS Advice
Bundall, QLD
Years of planning experience: 29
Minimum account size: \$500,000
Size of team: 19
Funds under advisement: \$1,427,555,000

28. Adam Montana

Altus Financial
Sydney, NSW
Years of planning experience: 17
Minimum account size: \$500,000
Size of team: 9
Funds under advisement: \$5,643,816,970

29. Anita Beckers

Macquarie Private Bank
Broadbeach, QLD
Years of planning experience: 29
Minimum account size: \$1,000,000
Size of team: 11
Funds under advisement: \$1,803,709,720

29. Matthew Gartrell

Macquarie Private Bank
Broadbeach, QLD
Years of planning experience: 18
Minimum account size: \$1,000,000
Size of team: 11
Funds under advisement: \$1,803,709,720

30. Jarrod Broadbent

BlueRock
Melbourne, VIC
Years of planning experience: 29
Minimum account size: \$400,000
Size of team: 12
Funds under advisement: \$1,530,000,000

31. Dave Haydon

Haydon Partners
Cairns City, QLD
Years of planning experience: 13
Minimum account size: \$500,000
Size of team: 5
Funds under advisement: \$420,750,000

32. James McGregor

Apt Wealth Partners
Sydney, NSW
Years of planning experience: 34
Minimum account size: No minimum
Size of team: 79
Funds under advisement: \$3,394,943,539

33. Gregory Mifsud

Altus Financial
Sydney, NSW
Years of planning experience: 20
Minimum account size: \$500,000
Size of team: 8
Funds under advisement: \$5,643,816,969

34. Andrew Rochester

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 31
Minimum account size: \$5,000,000
Size of team: 3
Funds under advisement: \$1,500,000,000

35. Sean Abbott

Koda Capital
Sydney, NSW
Years of planning experience: 27
Minimum account size: \$10,000,000
Size of team: 4
Funds under advisement: \$1,000,000,000

36. Nick Batrouney

Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 31
Minimum account size: \$3,000,000
Size of team: 10
Funds under advisement: \$3,103,500,000

37. Brad Wira

Shadforth Financial Group
West Leederville, WA
Years of planning experience: 24
Minimum account size: No minimum
Size of team: 9
Funds under advisement: \$1,256,059,263

38. Paul Nicol

GFM Wealth Advisory
Camberwell, VIC
Years of planning experience: 26
Minimum account size: \$1,000,000
Size of team: 28
Funds under advisement: \$3,135,000,000

39. Matt Koch *

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 41
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$2,503,800,000

40. Arjang Taylor

Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 20
Minimum account size: \$3,000,000
Size of team: 10
Funds under advisement: \$3,103,500,000

41. Paul Lyons

Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 31
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$1,500,000,000

42. Andrew Barlow

William Buck Wealth Advisors
Adelaide, SA
Years of planning experience: 11
Minimum account size: \$1,000,000
Size of team: 45
Funds under advisement: \$2,500,000,000

43. Will Hamilton *

Hamilton Wealth Partners
Glen Iris, VIC
Years of planning experience: 40
Minimum account size: \$2,500,000
Size of team: 12
Funds under advisement: \$1,102,942,315

44. Ben Andreou *

Koda Capital
Sydney, NSW
Years of planning experience: 10
Minimum account size: \$3,000,000
Size of team: 3
Funds under advisement: \$1,237,876,526

45. Hugh Robertson

Centaur Financial Services
Robina, QLD
Years of planning experience: 21
Minimum account size: \$1,000,000
Size of team: 9
Funds under advisement: \$1,324,756,404

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46. Peter Seldon

Morgan Stanley Wealth Management
Brisbane, QLD
Years of planning experience: 24
Minimum account size: \$2,000,000
Size of team: 6
Funds under advisement: \$1,150,000,000

47. Sally Huynh

Shadforth Financial Group
Brisbane, QLD
Years of planning experience: 22
Minimum account size: \$1,000,000
Size of team: 7
Funds under advisement: \$1,188,642,944

48. David Clark

Koda Capital
Sydney, NSW
Years of planning experience: 23
Minimum account size: \$5,000,000
Size of team: 4
Funds under advisement: \$1,349,567,455

49. Laurence Poulter

Partners Wealth Group
Sydney, NSW
Years of planning experience: 10
Minimum account size: \$1,000,000
Size of team: 146
Funds under advisement: \$5,639,410,995

50. Philip Davison

Shadforth Financial Group
Perth, WA
Years of planning experience: 22
Minimum account size: \$500,000
Size of team: 9
Funds under advisement: \$1,123,126,986

51. Stephen Shostak

Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 28
Minimum account size: \$5,000,000
Size of team: 16
Funds under advisement: \$4,300,000,000

52. Amanda Fong

Escala Partners
Melbourne, VIC
Years of planning experience: 24
Minimum account size: \$2,000,000
Size of team: 6
Funds under advisement: \$1,700,000,000

53. Andrew Bollen

Shadforth Financial Group
North Sydney, NSW
Years of planning experience: 26
Minimum account size: No minimum
Size of team: 9
Funds under advisement: \$1,152,460,425

54. Patrick Barry

Partners Wealth Group
Melbourne, VIC
Years of planning experience: 22
Minimum account size: \$2,500,000
Size of team: 146
Funds under advisement: \$5,639,410,995

55. Andrew Harrison

Shadforth Financial Group
North Sydney, NSW
Years of planning experience: 29
Minimum account size: \$500,000
Size of team: 7
Funds under advisement: \$1,179,186,675

56. Laurel Moulynnox

Morrows Private Wealth
Southbank, VIC
Years of planning experience: 21
Minimum account size: \$5,000,000
Size of team: 19
Funds under advisement: \$1,213,567,819

57. Michael Ogg *

Providence Wealth Advisory Group
Sydney, NSW
Years of planning experience: 25
Minimum account size: \$2,000,000
Size of team: 17
Funds under advisement: \$1,931,000,000

58. Paul Ashworth

Cameron Harrison Private
Melbourne, VIC
Years of planning experience: 29
Minimum account size: \$1,000,000
Size of team: 18
Funds under advisement: \$2,138,000,000

59. Stephen Jones

Smith Coffey
Subiaco, WA
Years of planning experience: 27
Minimum account size: No minimum
Size of team: 21
Funds under advisement: \$1,267,101,707

60. David Simon

Integral Private Wealth
Sydney, NSW
Years of planning experience: 24
Minimum account size: \$3,000,000
Size of team: 19
Funds under advisement: \$1,791,818,400

61. Clint Beeck

Shadforth Financial Group
Perth, WA
Years of planning experience: 28
Minimum account size: \$1,000,000
Size of team: 8
Funds under advisement: \$965,341,850

62. Marshall Brentnall

Evalasco Financial Services
Sydney, NSW
Years of planning experience: 25
Minimum account size: \$1,000,000
Size of team: 34
Funds under advisement: \$1,998,587,905

63. Richard Felice

Belay Advisory
Sydney, NSW
Years of planning experience: 17
Minimum account size: \$10,000,000
Size of team: 8
Funds under advisement: \$2,708,617,013

64. David Lipari

ANZ Private
Sydney, NSW
Years of planning experience: 20
Minimum account size: \$3,000,000
Size of team: 5
Funds under advisement: \$934,045,000

65. Craig Raitis

Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 24
Minimum account size: \$750,000
Size of team: 6
Funds under advisement: \$890,423,312

66. Andrew Hudson

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 19
Minimum account size: \$2,000,000
Size of team: 5
Funds under advisement: \$1,400,000,000

66. Scarlet Fung

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 26
Minimum account size: \$2,000,000
Size of team: 5
Funds under advisement: \$1,400,000,000

67. Simon Growden

Shadforth Financial Group
Perth, WA
Years of planning experience: 29
Minimum account size: \$500,000
Size of team: 6
Funds under advisement: \$933,518,522

68. Steven Grenda

Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 24
Minimum account size: No minimum
Size of team: 10
Funds under advisement: \$1,013,076,408

69. Andrew McCracken

Shadforth Financial Group
Adelaide, SA
Years of planning experience: 23
Minimum account size: No minimum
Size of team: 6
Funds under advisement: \$1,036,933,007

70. Belinda von Knoll

Shadforth Financial Group
Perth, WA
Years of planning experience: 25
Minimum account size: \$500,000
Size of team: 9
Funds under advisement: \$1,009,033,839

71. Travis Pitt *

Escala Partners
Melbourne, VIC
Years of planning experience: 28
Minimum account size: \$10,000,000
Size of team: 5
Funds under advisement: \$825,025,918

72. Charlie Fraser

Shadforth Financial Group
Brisbane, QLD
Years of planning experience: 24
Minimum account size: \$2,000,000
Size of team: 9
Funds under advisement: \$913,724,204

73. Mark Vignaroli

Perpetual Private
Melbourne, VIC
Years of planning experience: 29
Minimum account size: \$1,000,000
Size of team: 6
Funds under advisement: \$1,238,463,522

74. Andrew Pidgeon

Shadforth Financial Group
Perth, WA
Years of planning experience: 22
Minimum account size: \$500,000
Size of team: 7
Funds under advisement: \$1,095,009,113

75. Craig Tonkes

Koda Capital
Sydney, NSW
Years of planning experience: 23
Minimum account size: \$5,000,000
Size of team: 3
Funds under advisement: \$675,000,000

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TOP 150 FINANCIAL ADVISERS 2025

76. Ed Brooke

Escala Partners
Sydney, NSW
Years of planning experience: 19
Minimum account size: \$2,000,000
Size of team: 6
Funds under advisement: \$1,294,233,607

77. Neil Kendall

Tupicoffs, The Independent Financial Planners, Brisbane, QLD
Years of planning experience: 23
Minimum account size: \$3,000,000
Size of team: 22
Funds under advisement: \$2,780,233,876

78. Chris Murphy

Boston Private Wealth
Sanctuary Cove, QLD
Years of planning experience: 20
Minimum account size: \$1,000,000
Size of team: 5
Funds under advisement: \$686,948,600

79. Olivia Maragna

Aspire Retire
Brisbane, QLD
Years of planning experience: 22
Minimum account size: No minimum
Size of team: 11
Funds under advisement: \$505,000,000

80. Simon Mills *

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 27
Minimum account size: \$5,000,000
Size of team: 3
Funds under advisement: \$805,332,000

81. Simon Duckett

Koda Capital
Sydney, NSW
Years of planning experience: 27
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$887,569,619

82. Nicholas Carlton *

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 31
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$900,000,000

83. Mark Bradley

Morgan Stanley Wealth Management
Sydney, NSW
Years of planning experience: 33
Minimum account size: \$2,500,000
Size of team: 6
Funds under advisement: \$1,000,000,000

84. Mark Pollasky

Koda Capital
Sydney, NSW
Years of planning experience: 30
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$1,100,000,000

85. Richard Cooper

Wilsons Advisory
Brisbane, QLD
Years of planning experience: 27
Minimum account size: \$1,000,000
Size of team: 4
Funds under advisement: \$1,104,436,899

86. Charles Moore

Koda Capital
Sydney, NSW
Years of planning experience: 20
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$1,688,400,288

86. Peter Dunn

Koda Capital
Sydney, NSW
Years of planning experience: 10
Minimum account size: \$5,000,000
Size of team: 5
Funds under advisement: \$1,688,400,288

87. Glenn Fairbairn

Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 20
Minimum account size: \$2,000,000
Size of team: 5
Funds under advisement: \$422,000,000

88. Matthew Owen

Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 18
Minimum account size: \$5,000,000
Size of team: 16
Funds under advisement: \$4,300,000,000

89. Stuart Beattie

Shaw and Partners
Perth, WA
Years of planning experience: 31
Minimum account size: \$1,000,000
Size of team: 10
Funds under advisement: \$1,799,475,552

90. James Wortley

Enlightened Financial Solutions
Mackay, QLD
Years of planning experience: 28
Minimum account size: \$500,000
Size of team: 17
Funds under advisement: \$630,000,000

91. Les McGuire

Future Proof Wealth
Milton, QLD
Years of planning experience: 18
Minimum account size: \$1,000,000
Size of team: 12
Funds under advisement: \$668,440,283

92. Kate Golder

Alteris Financial Group
Brisbane, QLD
Years of planning experience: 23
Minimum account size: \$1,000,000
Size of team: 24
Funds under advisement: \$2,000,000,000

93. Liz Wheatley

Perpetual Private
Sydney, NSW
Years of planning experience: 8
Minimum account size: \$1,000,000
Size of team: 6
Funds under advisement: \$2,688,349,000

94. Joel Fuller

ANZ Private
Melbourne, VIC
Years of planning experience: 19
Minimum account size: \$3,000,000
Size of team: 4
Funds under advisement: \$772,270,485

95. Paul Begley

Koda Capital
West Perth, WA
Years of planning experience: 29
Minimum account size: \$4,000,000
Size of team: 5
Funds under advisement: \$967,452,000

96. Campbell Sorell

Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 24
Minimum account size: No minimum
Size of team: 5
Funds under advisement: \$846,369,411

97. Joshua Blythe

Shadforth Financial Group
North Sydney, NSW
Years of planning experience: 21
Minimum account size: \$750,000
Size of team: 8
Funds under advisement: \$744,962,597

98. Peggy (Bi-Chun) Liang

Stewart Brown Advisory
Chatswood, NSW
Years of planning experience: 8
Minimum account size: \$500,000
Size of team: 9
Funds under advisement: \$714,733,117

99. Harriet Gibb

Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 13
Minimum account size: No minimum
Size of team: 9
Funds under advisement: \$715,869,327

100. Nathan Lear

Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 14
Minimum account size: \$1,000,000
Size of team: 5
Funds under advisement: \$356,361,034

101. Sam Stillone

Esencia Wealth
Sydney, NSW
Years of planning experience: 28
Minimum account size: \$500,000
Size of team: 17
Funds under advisement: \$770,000,000

102. Farren Williams

Koda Capital
Melbourne, VIC
Years of planning experience: 21
Minimum account size: No minimum
Size of team: 3
Funds under advisement: \$805,000,000

103. Jordan Kennedy

Pitcher Partners
Sydney, NSW
Years of planning experience: 17
Minimum account size: \$2,000,000
Size of team: 15
Funds under advisement: \$2,593,785,000

104. Andrew Brunero

Shadforth Financial Group
North Sydney, NSW
Years of planning experience: 19
Minimum account size: \$1,000,000
Size of team: 7
Funds under advisement: \$706,853,867

105. Kevin Centra

Shadforth Financial Group
Geelong, VIC
Years of planning experience: 19
Minimum account size: \$500,000
Size of team: 6
Funds under advisement: \$460,196,331

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TOP 150 FINANCIAL ADVISERS 2025

106. Brett Ulrick

Elston
Bundall, QLD
Years of planning experience: 22
Minimum account size: \$1,250,000
Size of team: 5
Funds under advisement: \$450,000,000

107. Hamish Harvey

Stanford Brown Private Wealth
North Sydney, NSW
Years of planning experience: 18
Minimum account size: \$2,000,000
Size of team: 9
Funds under advisement: \$1,336,081,507

108. Paul Pellegrino

Partners in Planning
Carnegie, VIC
Years of planning experience: 16
Minimum account size: No minimum
Size of team: 12
Funds under advisement: \$850,000,000

109. Tony Sarai

Modoras
Brisbane, QLD
Years of planning experience: 22
Minimum account size: \$1,000,000
Size of team: 25
Funds under advisement: \$1,101,227,338

110. Jared Hoddinott

Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 12
Minimum account size: \$2,000,000
Size of team: 3
Funds under advisement: \$412,000,000

111. Peter Leggett

Arrow Private Wealth
Melbourne, VIC
Years of planning experience: 42
Minimum account size: \$1,500,000
Size of team: 11
Funds under advisement: \$683,001,400

112. Brendan Peacock

Pitcher Partners
Docklands, VIC
Years of planning experience: 9
Minimum account size: \$1,000,000
Size of team: 65
Funds under advisement: \$8,030,508,426

113. Chris Morcom

Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 25
Minimum account size: \$2,000,000
Size of team: 3
Funds under advisement: \$454,800,000

114. Martin Becker *

Fairbridge Wealth Management
Sydney, NSW
Years of planning experience: 18
Minimum account size: \$1,000,000
Size of team: 8
Funds under advisement: \$503,000,000

115. Trent Doughty *

Kelly+Partners Private Wealth
Sydney, NSW
Years of planning experience: 22
Minimum account size: \$1,000,000
Size of team: 7
Funds under advisement: \$705,050,000

116. Finn Dorney

Shadforth Financial Group
Hobart, TAS
Years of planning experience: 17
Minimum account size: No minimum
Size of team: 6
Funds under advisement: \$712,005,230

117. Michael Dwyer

Shadforth Financial Group
Brisbane, QLD
Years of planning experience: 15
Minimum account size: \$1,000,000
Size of team: 5
Funds under advisement: \$922,173,032

118. Kathryn Humphreys

Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 24
Minimum account size: No minimum
Size of team: 7
Funds under advisement: \$676,854,792

119. Edward Fletcher

Pitcher Partners
Brisbane, QLD
Years of planning experience: 13
Minimum account size: \$5,000,000
Size of team: 17
Funds under advisement: \$2,395,609,884

120. Stuart Graham

Shadforth Financial Group
Melbourne, VIC
Years of planning experience: 17
Minimum account size: \$500,000
Size of team: 8
Funds under advisement: \$667,739,958

121. Campbell Breheny

Shadforth Financial Group
Hobart, TAS
Years of planning experience: 18
Minimum account size: No minimum
Size of team: 6
Funds under advisement: \$837,577,500

122. Patrick Malcolm

GFM Wealth Advisory
Camberwell, VIC
Years of planning experience: 13
Minimum account size: \$500,000
Size of team: 28
Funds under advisement: \$3,135,000,000

123. Lynda McKie

Elston
Fortitude Valley, QLD
Years of planning experience: 36
Minimum account size: \$1,500,000
Size of team: 5
Funds under advisement: \$345,006,819

124. Katrina Pulbrook

RJS Wealth Management
Melbourne, VIC
Years of planning experience: 22
Minimum account size: \$500,000
Size of team: 25
Funds under advisement: \$1,101,227,338

125. Joseph Smith

Macquarie Private Bank
Melbourne, VIC
Years of planning experience: 8
Minimum account size: \$5,000,000
Size of team: 16
Funds under advisement: \$4,300,000,000

126. Simon Curtain

Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 19
Minimum account size: \$1,000,000
Size of team: 3
Funds under advisement: \$371,747,848

127. Steven de Natris

Perpetual Private
Melbourne, VIC
Years of planning experience: 14
Minimum account size: \$1,000,000
Size of team: 7
Funds under advisement: \$1,119,357,000

128. Martin Fowler

Pitcher Partners
Sydney, NSW
Years of planning experience: 26
Minimum account size: \$1,000,000
Size of team: 15
Funds under advisement: \$2,593,785,000

129. Katerina Sousalis

Modoras
Brisbane, QLD
Years of planning experience: 22
Minimum account size: \$750,000
Size of team: 25
Funds under advisement: \$1,101,227,338

130. Michael Smith

Macquarie Private Bank
Fortitude Valley, QLD
Years of planning experience: 13
Minimum account size: \$1,000,000
Size of team: 9
Funds under advisement: \$2,524,438,272

131. David Meffert

Discover Financial Partners
Richmond, VIC
Years of planning experience: 22
Minimum account size: No minimum
Size of team: 6
Funds under advisement: \$668,150,000

132. Todd Stanford

Stanford Brown Private Wealth
North Sydney, NSW
Years of planning experience: 25
Minimum account size: \$1,000,000
Size of team: 10
Funds under advisement: \$1,075,930,120

133. Juliana Rajkovic

Escala Partners
Melbourne, VIC
Years of planning experience: 8
Minimum account size: \$2,500,000
Size of team: 9
Funds under advisement: \$580,000,000

134. David Burgess

Morgan Stanley Wealth Management
Adelaide, SA
Years of planning experience: 27
Minimum account size: \$2,500,000
Size of team: 5
Funds under advisement: \$2,139,331,000

134. Sam Saunders

Morgan Stanley Wealth Management
Adelaide, SA
Years of planning experience: 17
Minimum account size: \$2,500,000
Size of team: 5
Funds under advisement: \$2,139,331,000

135. Antony Green

Morgan Stanley Wealth Management
Melbourne, VIC
Years of planning experience: 28
Minimum account size: \$2,000,000
Size of team: 2
Funds under advisement: \$526,000,000

BARRON'S

TOP 150 FINANCIAL ADVISERS 2025

136. Simon Wotherspoon

Perks Private Wealth
Adelaide, SA
Years of planning experience: 18
Minimum account size: No minimum
Size of team: 30
Funds under advisement: \$1,521,414,516

137. Travis Schindler

Hewison Private Wealth
Melbourne, VIC
Years of planning experience: 7
Minimum account size: \$2,500,000
Size of team: 4
Funds under advisement: \$301,882,481

138. Alex O'Brien

Alteris Financial Group
Sydney, NSW
Years of planning experience: 13
Minimum account size: \$1,000,000
Size of team: 24
Funds under advisement: \$2,000,000,000

139. Anthony Castellaro

Elston
Fortitude Valley, QLD
Years of planning experience: 23
Minimum account size: \$2,000,000
Size of team: 5
Funds under advisement: \$690,000,000

140. Ben Woolvett

Signate Private Wealth
Rose Park, SA
Years of planning experience: 21
Minimum account size: \$400,000
Size of team: 24
Funds under advisement: \$827,455,246

141. Susan Buda

Focus Partners Australia
Sydney, NSW
Years of planning experience: 13
Minimum account size: No minimum
Size of team: 15
Funds under advisement: \$1,272,054,135

142. Jonathan Kilborn

Cardena Private Wealth
Sydney, NSW
Years of planning experience: 26
Minimum account size: \$2,000,000
Size of team: 11
Funds under advisement: \$855,700,000

143. Mark Spencer

Shadforth Financial Group
Ballarat, VIC
Years of planning experience: 36
Minimum account size: \$500,000
Size of team: 7
Funds under advisement: \$517,301,193

144. Will Kenny

Canaccord Genuity
Brisbane, QLD
Years of planning experience: 12
Minimum account size: \$2,500,000
Size of team: 6
Funds under advisement: \$728,866,162

145. Peta Nunn

Perks Private Wealth
Adelaide, SA
Years of planning experience: 23
Minimum account size: No minimum
Size of team: 30
Funds under advisement: \$1,521,414,516

146. Ryan Loehr *

Emanuel Whybourne & Loehr
Fortitude Valley, QLD
Years of planning experience: 13
Minimum account size: \$2,500,000
Size of team: 16
Funds under advisement: \$2,500,000,000

147. Richard McClelland

Perpetual Private
Sydney, NSW
Years of planning experience: 10
Minimum account size: \$1,500,000
Size of team: 11
Funds under advisement: \$1,588,000,000

148. Angus Rodgers

PrimeWealth
Chatswood, NSW
Years of planning experience: 10
Minimum account size: \$500,000
Size of team: 19
Funds under advisement: \$830,000,000

149. Andrew Wilson

Pitcher Partners
Sydney, NSW
Years of planning experience: 18
Minimum account size: \$2,000,000
Size of team: 15
Funds under advisement: \$2,593,785,000

150. Jacqueline Kirkwood

Shadforth Financial Group
Hobart, TAS
Years of planning experience: 21
Minimum account size: No minimum
Size of team: 6
Funds under advisement: \$540,906,474

State by State

New South Wales

4. Paul Burgon
6. Campbell Vidgen
7. Charlie Viola
10. Frank Macindoe *
18. Tim Eustace
19. Ben Forrester
20. Bernie (Bernadette) Connolly
20. Patrick Regan
21. Jamie Cockerill
22. Matthew Smith
23. Phillip Gillard
25. Scott Girdlestone
28. Adam Montana
32. James McGregor
33. Gregory Mifsud
34. Andrew Rochester
35. Sean Abbott
39. Matt Koch *
44. Ben Andreou *
48. David Clark
49. Laurence Poulter
53. Andrew Bollen
55. Andrew Harrison
57. Michael Ogg *
60. David Simon
62. Marshall Brentnall
63. Richard Felice
64. David Lipari
66. Andrew Hudson
66. Scarlet Fung
75. Craig Tonkes
76. Ed Brooke
80. Simon Mills *
81. Simon Duckett
82. Nicholas Carlton *
83. Mark Bradley
84. Mark Pollasky
86. Charles Moore
86. Peter Dunn
93. Liz Wheatley
97. Joshua Blythe
98. Peggy (Bi-Chun) Liang
101. Sam Stillone
103. Jordan Kennedy
104. Andrew Brunero
107. Hamish Harvey
114. Martin Becker *
115. Trent Doughty *
128. Martin Fowler
132. Todd Stanford
138. Alex O'Brien
141. Susan Buda
142. Jonathan Kilborn
147. Richard McClelland
148. Angus Rodgers
149. Andrew Wilson

Queensland

13. Chris Smith
26. Ashley Davis
27. Troy Theobald
29. Anita Beckers
29. Matthew Gartrell
31. Dave Haydon
45. Hugh Robertson
46. Peter Seldon
47. Sally Huynh
72. Charlie Fraser
77. Neil Kendall
78. Chris Murphy
79. Olivia Maragna
85. Richard Cooper
90. James Wortley
91. Les McGuire
92. Kate Golder
106. Brett Ulrick
109. Tony Sarai
117. Michael Dwyer
119. Edward Fletcher
123. Lynda McKie
129. Katerina Sousalis
130. Michael Smith
139. Anthony Castellaro
144. Will Kenny
146. Ryan Loehr *

South Australia

42. Andrew Barlow
69. Andrew McCracken
134. David Burgess
134. Sam Saunders
136. Simon Wotherspoon
140. Ben Woolvett
145. Peta Nunn

Tasmania

116. Finn Dorney
121. Campbell Breheny
150. Jacqueline Kirkwood

Western Australia

37. Brad Wira
50. Philip Davison
59. Stephen Jones
61. Clint Beeck
67. Simon Growden
70. Belinda von Knoll
74. Andrew Pidgeon
89. Stuart Beattie
95. Paul Begley

Victoria

1. Mathew Cassidy
2. Andrew Dunbar
3. Scott Carmichael
5. Robert Hand
8. Benjamin Kohn
9. Andrew Cowen
11. Matthew Donat
12. David Bedford
14. Adam Stanley
15. Daniel Tome
16. Chad Brendish
17. Ben James
24. Kellie Davidson
30. Jarrod Broadbent
36. Nick Batrouney
38. Paul Nicol
40. Arjang Taylor
41. Paul Lyons
43. Will Hamilton *
51. Stephen Shostak
52. Amanda Fong
54. Patrick Barry
56. Laurel Moullynnox
58. Paul Ashworth
65. Craig Raits
68. Steven Grenda
71. Travis Pitt *
73. Mark Vignaroli
87. Glenn Fairbairn
88. Matthew Owen
94. Joel Fuller
96. Campbell Sorell
99. Harriet Gibb
100. Nathan Lear
102. Farren Williams
105. Kevin Centra
108. Paul Pellegrino
110. Jared Hoddinott
111. Peter Leggett
112. Brendan Peacock
113. Chris Morcom
118. Kathryn Humphreys
120. Stuart Graham
122. Patrick Malcolm
124. Katrina Pulbrook
125. Joseph Smith
126. Simon Curtain
127. Steven de Natris
131. David Meffert
133. Juliana Rajkovic
135. Antony Green
137. Travis Schindler
143. Mark Spencer