

THE LIST

AUSTRALIA'S TOP 100 FINANCIAL ADVISERS IN ASSOCIATION WITH BARRON'S

The fourth edition of the Top Australian Advisers ranking should be familiar to readers of The Deal in many ways. As in years past, the listing is a collaboration between The Australian and its corporate cousin, Barron's, a 99-year old American magazine for investors. The ranking continues to function as both a guide for consumers looking for an adviser and as a scorecard that advisers can use to measure themselves against one another. The list's core mission remains the same as well: to shine a light on the best financial advisers in hopes of encouraging others to emulate them, thereby improving client care standards in the industry.

The formula used to calculate the ranking is rooted in the same 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, client-service resources, and charitable and philanthropic work.

For the first time, the Top Australian Adviser ranking has 100 spots, up from 50 in 2017, 2018 and 2019. We've expanded the ranking for two reasons. First, the number of qualified advisers submitting answers to our 73-question survey almost doubled this year, to just under 300. Second, we wanted to showcase more independent advisers and more advisers in cities outside of Sydney and Melbourne.

If the ranking effort continues its growth trajectory, we're hopeful that 2021 will allow for some more creative sorting of the ranked advisers, to make the listing even more useful to readers.

Matt Barthel

Executive Editor

Dow Jones Wealth and Asset Management group (part of Barron's magazine)

Rank 1 2019 2 Name Garth Hu Firm Morgan Stanley Wealth Management Location Melbourne VIC Years of planning experience 13 Minimum account size \$5,000,000 Size of team 6 Funds under advisement \$1.5bn

Rank 2 2019 17 Name Andrew Cowen Firm Macquarie Private Bank Location Melbourne VIC Years of planning experience 13 Minimum account size \$5,000,000 Size of team 11 Funds under advisement \$1.86bn

Rank 3 2019 7 Name Mason Allamby Firm Escala Partners Location Melbourne VIC Years of planning experience 19 Minimum account size \$2,500,000 Size of team 5 Funds under

advisement \$730m

Rank 4 2019 NR Name Steve Collins Firm Escala Partners Location Melbourne VIC Years of planning experience 15 Minimum account size \$2,500,000 Size of team 5 Funds under advisement \$730m

Rank 5 2019 NR Name Campbell Vidgen Firm Macquarie Private Bank Location Sydney NSW Years of planning experience 11 Minimum account size \$5,000,000 Size of team 12 Funds under advisement \$2.39bn Rank 6 2019 3 Name Scott Carmichael Firm Escala Partners Location Melbourne VIC Years of planning experience 22 Minimum account size \$5,000,000 Size of team 8 Funds under advisement \$1.35bn

Rank 7 2019 15 Name Chad Brendish Firm Morgan Stanley Wealth Management Location Melbourne VIC Years of planning experience 34 Minimum account size \$3,000,000 Size of team 10 Funds under advisement \$1.39bn

Rank 8 2019 NR Name Mathew Cassidy Firm Partners Wealth Group Location Melbourne VIC Years of planning experience 19 Minimum account size \$500,000 Size of team 42 Funds under advisement \$1.7bn

Rank 9 2019 6 Name Ben James Firm Escala Partners Location Melbourne VIC Years of planning experience 22 Minimum account size \$5,000,000 Size of team 8 Funds under advisement \$890m

Rank 10 2019 23 Name Nick Batrouney Firm Morgan Stanley Wealth Management Location Melbourne VIC Years of planning experience 26 Minimum account size \$3,500,000 Size of team 10 Funds under advisement \$1.39bn

Rank 11 2019 14 Name Frank Macindoe Firm Koda Capital Location Sydney NSW Years of planning experience 18 Minimum account size \$2,000,000 Size of team 4 Funds under advisement \$1.2bn

Rank 12 2019 NR Name Heath McLaren Firm Macquarie Private Bank Location Manly NSW Years of planning experience 21 Minimum account size \$5,000,000 Size of team 8 Funds under advisement \$1.2bn

Rank 13 2019 22 Name David Simon Firm Integral Private Wealth Location Sydney NSW Years of planning experience 19 Minimum account size \$1,500,000 Size of team 35 Funds under advisement \$1.5bn Rank 14 2019 38 Name Steve Triantafilidis Firm Morgan Stanley Wealth Management Location Adelaide SA Years of planning experience 34 Minimum account size \$500,000 Size of team 9 Funds under advisement \$870m

Rank 15 2019 4 Name Charlie Viola Firm Pitcher Partners Sydney Wealth Management Location Sydney NSW Years of planning experience 21 Minimum account size \$1,500,000 Size of team 22 Funds under advisement \$2.6bn

Rank 16 2019 8 Name Anita Beckers Firm Macquarie Private Bank Location Broadbeach QLD Years of planning experience 23 Minimum account size \$1,000,000 Size of team 6 Funds under advisement \$850m

Rank 17 2019 10 Name Matthew Gartrell Firm Macquarie Private Bank Location Broadbeach QLD Years of planning experience 12 Minimum account size \$1,000,000 Size of team 6 Funds under advisement \$850m

Rank 18 2019 5 Name Adam Stanley Firm Pitcher Partners Investment Services Location Docklands VIC Years of planning experience 18 Minimum account size \$1,000,000 Size of team 60 Funds under advisement \$5.9bn

Rank 19 2019 NR Name Jason Featherby Firm Knight Financial Advisors Location Subiaco WA Years of planning experience 18 Minimum account size no minimum Size of team 12 Funds under advisement \$800m

Rank 20 2019 35 Name Brett Stene Firm Jacaranda Financial Planning Location Sydney NSW Years of planning experience 16 Minimum account size \$250,000 Size of team 20 Funds under advisement \$660m

Rank 21 2019 NR Name Troy Theobald Firm Robina Financial Solutions Location Robina QLD Years of planning experience 24 Minimum account size \$250,000 Size of team 20 Funds under advisement \$605m

Rank 22 2019 NR Name Daniel Tome Firm Perpetual Private Location Melbourne VIC Years of planning experience 25 Minimum account size \$500,000 Size of team 6 Funds under advisement \$1.04bn

Rank 23 2019 43 Name Chris Smith Firm VISIS Private Wealth Location Brisbane QLD Years of planning experience 20 Minimum account size \$1,000,000 Size of team 8 Funds under advisement \$346m

Rank 24 2019 9 Name Craig Emanuel Firm Morgan Stanley Wealth Management Location Brisbane QLD Years of planning experience 26 Minimum account size \$1,000,000 Size of team 5 Funds under advisement \$760m

Rank 25 2019 19 Name Paul Burgon Firm Lipman Burgon & Partners Location Sydney NSW Years of planning experience 15 Minimum account size \$10,000,000 Size of team 16 Funds under advisement \$1.25bn

Rank 26 2019 11 Name Charles Moore Firm Koda Capital Location Sydney NSW Years of planning experience 15 Minimum account size \$3,000,000 Size of team 4 Funds under advisement \$775m

Rank 27 2019 13 Name Peter Dunn Firm Koda Capital Location Sydney NSW Years of planning experience 5 Minimum account size \$3,000,000 Size of team 4 Funds under advisement \$775m

Rank 28 2019 45 Name Hamish Harvey Firm Stanford Brown Location North Sydney NSW Years of planning experience 13 Minimum account size \$1,000,000 Size of team 10 Funds under advisement \$738m

Rank 29 2019 1 Name Sue Dahn Firm Pitcher Partners Investment Services Location Docklands VIC Years of planning experience 22 Minimum account size \$1,000,000 Size of team 60 Funds under advisement \$5.9bn Rank 30 2019 27 Name Tim Mackay Firm Quantum Financial Location

Sydney NSW Years of planning experience 15 Minimum account size no minimum Size of team 12 Funds under advisement \$434m

Rank 31 2019 26 Name Claire Mackay Firm Quantum Financial Location Sydney NSW Years of planning experience 11 Minimum account size no minimum Size of team 12 Funds under advisement \$434m

Rank 32 2019 12 Name Bernie Connolly Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 14 Minimum account size \$2,000,000 Size of team 9 Funds under advisement \$1.81bn

Rank 33 2019 NR Name Patrick Regan Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 13 Minimum account size \$2,000,000 Size of team 9 Funds under advisement \$1.81bn

Rank 34 2019 29 Name Chris Marshall Firm Perpetual Private Location Perth WA Years of planning experience 22 Minimum account size \$1,000,000 Size of team 9 Funds under advisement \$1.19bn

Rank 35 2019 NR Name Kellie Davidson Firm Pitcher Partners Investment Services Location Docklands VIC Years of planning experience 18 Minimum account size \$1,000,000 Size of team 60 Funds under advisement \$5.9bn

Rank 36 2019 34 Name Olivia Maragna Firm Aspire Retire Location Brisbane QLD Years of planning experience 17 Minimum account size no minimum Size of team 14 Funds under advisement \$300m

Rank 37 2019 NR Name Andrew Rochester Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 26 Minimum account size \$1,000,000 Size of team 3 Funds under advisement \$1bn Rank 38 2019 24 Name Travis Pitt Firm Morgan Stanley Wealth Management Location Melbourne VIC Years of planning experience 23 Minimum account size \$10,000,000 Size of team 2 Funds under advisement \$750m

Rank 39 2019 28 Name Mark Bradley Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 28 Minimum account size \$1,000,000 Size of team 4 Funds under advisement \$520m

Rank 40 2019 44 Name Paul Nicol Firm GFM Wealth Advisory Location Camberwell VIC Years of planning experience 20 Minimum account size no minimum Size of team 21 Funds under advisement \$777m

Rank 41 2019 18 Name Ben Forrester Firm Macquarie Group Location Sydney NSW Years of planning experience 11 Minimum account size \$5,000,000 Size of team 4 Funds under advisement \$700m

Rank 42 2019 21 Name Matt Koch Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 35 Minimum account size \$2,000,000 Size of team 6 Funds under advisement \$1.7bn

Rank 43 2019 30 Name Sean Abbott Firm Koda Capital Location Sydney NSW Years of planning experience 22 Minimum account size \$4,000,000 Size of team 3 Funds under advisement \$420m

Rank 44 2019 NR Name Andrew Gratton Firm Viridian Advisory Location Melbourne VIC Years of planning experience 4 Minimum account size \$1,000,000 Size of team 17 Funds under advisement \$792m

Rank 45 2019 36 Name Paul Brady Firm Brady & Associates Financial Advisers Location Sydney NSW Years of planning experience 31 Minimum account size no minimum Size of team 9 Funds under advisement \$585m Rank 46 2019 NR Name James Wortley Firm Enlightened Financial Solutions Location Mackay QLD Years of planning experience 22 Minimum account size no minimum Size of team 14 Funds under advisement \$300m

Rank 47 2019 31 Name Neil Heriot Firm Boston Private Wealth Location Sanctuary Cove QLD Years of planning experience 31 Minimum account size \$500,000 Size of team 5 Funds under advisement \$680m

Rank 48 2019 33 Name Michael Muehlheim Firm Macquarie Private Bank Location Sydney NSW Years of planning experience 21 Minimum account size \$5,000,000 Size of team 5 Funds under advisement \$575m

Rank 49 2019 NR Name Arjang Taylor Firm Morgan Stanley Wealth Management Location Melbourne VIC Years of planning experience 15 Minimum account size \$3,000,000 Size of team 10 Funds under advisement \$1.39bn

Rank 50 2019 25 Name William Douglas Firm Koda Capital Location Brisbane QLD Years of planning experience 22 Minimum account size \$3,000,000 Size of team 5 Funds under advisement \$595m

Rank 51 2019 20 Name Paul Lyons Firm Morgan Stanley Wealth Management Location Melbourne VIC Years of planning experience 25 Minimum account size no minimum Size of team 3 Funds under advisement \$750m

Rank 52 2019 NR Name Scott Girdlestone Firm William Buck Wealth Advisors Location Sydney NSW Years of planning experience 18 Minimum account size no minimum Size of team 20 Funds under advisement \$950m

Rank 53 2019 NR Name Andrew Parker Firm Perpetual Private Location Adelaide SA Years of planning experience 9 Minimum account size \$1,000,000 Size of team 3 Funds under advisement \$374m

Rank 54 2019 37 Name Matthew Donat Firm Koda Capital Location Melbourne VIC Years of planning experience 10 Minimum account size \$3,000,000 Size of team 3 Funds under advisement \$650m

Rank 55 2019 NR Name David Ross-Edwards Firm Morgan Stanley Wealth Management Location Melbourne VIC Years of planning experience 27 Minimum account size \$1,750,000 Size of team 8 Funds under advisement \$460m

Rank 56 2019 50 Name Dean Ireland Firm Elston Location Fortitude Valley QLD Years of planning experience 14 Minimum account size \$600,000 Size of team 48 Funds under advisement \$2bn

Rank 57 2019 NR Name Michael Ogg Firm Providence Wealth Advisory Group Location Sydney NSW Years of planning experience 20 Minimum account size \$3,000,000 Size of team 14 Funds under advisement \$800m

Rank 58 2019 NR Name Grant Patterson Firm Providence Wealth Advisory Group Location Sydney NSW Years of planning experience 19 Minimum account size \$3,000,000 Size of team 14 Funds under advisement \$800m

Rank 59 2019 NR Name David Burgess Firm Morgan Stanley Wealth Management Location Adelaide SA Years of planning experience 20 Minimum account size no minimum Size of team 5 Funds under advisement \$1bn

Rank 60 2019 NR Name Chris Morcom Firm Hewison Private Wealth Location Melbourne VIC Years of planning experience 20 Minimum account size \$1,000,000 Size of team 13 Funds under advisement \$1.15bn Rank 61 2019 NR Name Glenn Fairbairn Firm Hewison Private Wealth Location Melbourne VIC Years of planning experience 14 Minimum account size \$1,000,000 Size of team 13 Funds under advisement \$1.15bn

Rank 62 2019 42 Name Mark Minchin Firm Minchin Moore Private Wealth Advisers Location Mosman NSW Years of planning experience 17 Minimum account size no minimum Size of team 30 Funds under advisement \$1.33bn

Rank 63 2019 32 Name Amanda Fong Firm Escala Partners Location Melbourne VIC Years of planning experience 19 Minimum account size \$1,000,000 Size of team 8 Funds under advisement \$850m

Rank 64 2019 NR Name Jamie Cockerill Firm Perpetual Private Location Sydney NSW Years of planning experience 20 Minimum account size no minimum Size of team 4 Funds under advisement \$1.75bn

Rank 65 2019 NR Name Marisa Broome Firm wealthadvice Location Balmain NSW Years of planning experience 22 Minimum account size no minimum Size of team 6 Funds under advisement \$755m

Rank 66 2019 NR Name Claire Dickinson Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 27 Minimum account size no minimum Size of team 3 Funds under advisement \$1.8bn

Rank 67 2019 NR Name Simon Hele Firm Perks Private Wealth Location Adelaide SA Years of planning experience 26 Minimum account size no minimum Size of team 27 Funds under advisement \$910m

Rank 68 2019 NR Name Steve Melling Firm Melling Retirement Planning Location Heidelberg VIC Years of planning experience 16 Minimum account size \$500,000 Size of team 15 Funds under advisement \$450m Rank 69 2019 NR Name Nathan Lear Firm Hewison Private Wealth Location Melbourne VIC Years of planning experience 9 Minimum account size \$1,000,000 Size of team 13 Funds under advisement \$1.15bn

Rank 70 2019 46 Name Phillip Gillard Firm Shadforth Financial Group Location North Sydney NSW Years of planning experience 23 Minimum account size \$300,000 Size of team 6 Funds under advisement \$394m

Rank 71 2019 39 Name Marc Smith Firm Integral Private Wealth Brisbane Location Brisbane QLD Years of planning experience 21 Minimum account size \$1,500,000 Size of team 35 Funds under advisement \$1.5bn

Rank 72 2019 NR Name Stephen Jones Firm Smith Coffey Location Subiaco WA Years of planning experience 21 Minimum account size no minimum Size of team 23 Funds under advisement \$647m

Rank 73 2019 40 Name Simon Duckett Firm Koda Capital Location Sydney NSW Years of planning experience 21 Minimum account size \$3,000,000 Size of team 2 Funds under advisement \$630m

Rank 74 2019 49 Name Will Hamilton Firm Hamilton Wealth Partners Location Glen Iris VIC Years of planning experience 34 Minimum account size \$2,000,000 Size of team 9 Funds under advisement \$611m

Rank 75 2019 NR Name David Lane Firm Pitcher Partners Wealth Management Location Brisbane QLD Years of planning experience 27 Minimum account size \$500,000 Size of team 8 Funds under advisement \$980m

Rank 76 2019 NR Name Adam Griffiths Firm Morgan Stanley Wealth Management Location Adelaide SA Years of planning experience 19 Minimum account size no minimum Size of team 2 Funds under advisement \$491m Rank 77 2019 NR Name David Clark Firm Koda Capital Location Sydney NSW Years of planning experience 17 Minimum account size \$3,000,000 Size of team 3 Funds under advisement \$532m

Rank 78 2019 NR Name Scarlet Fung Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 20 Minimum account size \$1,000,000 Size of team 4 Funds under advisement \$540m

Rank 79 2019 NR Name Andrew Hudson Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 13 Minimum account size \$1,000,000 Size of team 4 Funds under advisement \$540m

Rank 80 2019 NR Name Paul Ashworth Cameron Harrison Private Location Melbourne VIC Years of planning experience 23 Minimum account size \$1,000,000 Size of team 9 Funds under advisement \$721m

Rank 81 2019 NR Name Simon Curtain Firm Hewison Private Wealth Location Melbourne VIC Years of planning experience 4 Minimum account size \$1,000,000 Size of team 13 Funds under advisement \$1.15bn

Rank 82 2019 NR Name Anthony Castellaro Firm Elston Location Fortitude Valley QLD Years of planning experience 18 Minimum account size \$1,500,000 Size of team 6 Funds under advisement \$320m

Rank 83 2019 NR Name Mark Vignaroli Firm Perpetual Private Location Melbourne VIC Years of planning experience 24 Minimum account size \$500,000 Size of team 5 Funds under advisement \$950m

Rank 84 2019 47 Name Sally Huynh Firm Shadforth Financial Group Location Brisbane QLD Years of planning experience 17 Minimum account size \$300,000 Size of team 2 Funds under advisement \$320m

Rank 85 2019 NR Name Les McGuire Firm Future Proof Financial Location Ballina NSW Years of planning experience 12 Minimum account size \$750,000 Size of team 16 Funds under advisement \$423m

Rank 86 2019 NR Name Sarah Robinson Firm Macquarie Private Bank Location Melbourne VIC Years of planning experience 27 Minimum account size \$1,000,000 Size of team 7 Funds under advisement \$524m

Rank 87 2019 41 Name Douglas Turek Firm Professional Wealth Location Melbourne VIC Years of planning experience 15 Minimum account size \$1,000,000 Size of team 4 Funds under advisement \$380m

Rank 88 2019 NR Name Ben Andreou Firm Koda Capital Location Sydney NSW Years of planning experience 5 Minimum account size \$3,000,000 Size of team 2 Funds under advisement \$570m

Rank 89 2019 NR Name David Raits Firm Shadforth Financial Group Location Melbourne VIC Years of planning experience 25 Minimum account size \$300,000 Size of team 3 Funds under advisement \$257m

Rank 90 2019 NR Name Emma Brickacek Firm Morgan Stanley Wealth Management Location Sydney NSW Years of planning experience 18 Minimum account size \$1,000,000 Size of team 3 Funds under advisement \$200m

Rank 91 2019 48 Name Nick Walter Firm Macquarie Private Bank Location Sydney NSW Years of planning experience 20 Minimum account size \$2,000,000 Size of team 5 Funds under advisement \$585m

Rank 92 2019 NR Name Stuart Beattie Firm Morgan Stanley Wealth Management Location Perth WA Years of planning experience 25 Minimum account size \$1,000,000 Size of team 10 Funds under advisement \$1.3bn Rank 93 2019 NR Name Jonathan Kilborn Firm Cardena Private Wealth Location Sydney NSW Years of planning experience 20 Minimum account size \$1,000,000 Size of team 10 Funds under advisement \$400m

Rank 94 2019 NR Name Neil Kendall Firm Tupicoffs - The Independent Financial Planners Location Brisbane QLD Years of planning experience 18 Minimum account size \$1,000,000 Size of team 26 Funds under advisement \$1.14bn

Rank 95 2019 NR Name Amanda Lee Firm Stewart Brown Advisory Location Chatswood NSW Years of planning experience 16 Minimum account size \$500,000 Size of team 7 Funds under advisement \$315m

Rank 96 2019 NR Name Adrian Frinsdorf Firm William Buck Wealth Advisors Location Adelaide SA Years of planning experience 24 Minimum account size no minimum Size of team 27 Funds under advisement \$1.48bn

Rank 97 2019 NR Name Patrick Malcolm Firm GFM Wealth Advisory Location Camberwell VIC Years of planning experience 8 Minimum account size no minimum Size of team 21 Funds under advisement \$777m

Rank 98 2019 NR Name Campbell Sorell Firm Shadforth Financial Group Location Melbourne VIC Years of planning experience 19 Minimum account size \$300,000 Size of team 6 Funds under advisement \$561m

Rank 99 2019 NR Name Luke Rathborne Firm Fortitude Private Wealth Location Sydney NSW Years of planning experience 15 Minimum account size no minimum Size of team 6 Funds under advisement \$285m

Rank 100 2019 NR Name Kate Golder Firm Alteris Financial Group Location Brisbane QLD Years of planning experience 17 Minimum account size \$500,000 Size of team 23 Funds under advisement \$1bn