

Media Release

Successful acquisition celebrates milestone – new opportunities being sought

Friday July 31, 2015. This month marks the one year milestone of the acquisition of Portfolio Managers by Paradigm Wealth Management (Paradigm) and Managing Director Patrick Nalty has confirmed the merger has successfully fulfilled all the commercial, succession and client service aspirations of both groups.

Commenting further, Nalty said the advisers, staff and administrative frameworks merged quickly and effortlessly into one integrated and larger business reflecting the *'ideal cultural fit'* that brought the two parties together 12 months ago.

“Clients have benefited immensely as a result of the increased scale, synergies and access to more investment and service options”, continued Nalty.

“Furthermore, investors have access to a broader team of CFP advisers and professional investment management via Paradigm’s MDA that is supported by an independent investment committee”.

For Portfolio Managers principals Brett Davis and Paul Hewins the goals of a succession outcome and opportunity to partner with a likeminded firm offering modern portfolio management were also realised. Their extensive knowledge, insight and expertise has been utilised in key roles with Davis’s experience in asset and investment management reflected as Head of Asset Management.

Davis recently returned from Europe having taken leave to fulfill his long time ambition to swim the English Channel. Hewins chose to first visit the Wall Street financial centre in New York before connecting with his family to enjoy the sights and sounds of Disneyland.

Nalty continued, “Being a larger business has also provided our staff with more career advancement opportunities. In addition, we are committed to our staff’s ongoing personal and professional development by encouraging them to undertake further training and study programs”.

As Paradigm looks to the future, growth will be a key objective of the independently owned advisory group as it seeks to capitalise on its scale, capacity and marketplace brand and reputation.

Not being aligned to an institution is seen as a significant advantage and beacon that will attract not only client service opportunities – but also advisers

seeking the benefits of a group managed and guided by experienced owners with 'real' hands on industry experience and expertise.

However, growth for growth's sake is not Paradigm's goal and any group or individual wishing to join or be aligned with the business must be a cultural fit first!

Nalty concluded, "The success of the Portfolio Managers acquisition has surpassed our expectations and Paradigm has emerged a better and stronger company. Our intention is to now capitalise on this potential with further acquisition opportunities and innovative marketplace offerings".

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