

## Media Release

# Paradigm responds to client interest with P2P seminar and information events

**Friday September 11, 2015.** Paradigm Group (Paradigm) Managing Director Patrick Nalty recently hosted an information seminar to welcome new clients to the organisation with an investment update and an insight into the challenge of intergenerational wealth transfer. Both topics were considered of significant interest and the seminar format was an excellent opportunity to address these areas in depth with presentations from industry experts.

Although Paradigm is regarded as a leading industry practitioner that adopts new technologies, processes and practices to engage and service the needs of clients to the highest of standards – Nalty takes great personal pride that the importance of personal face to face engagement and interaction with clients is ingrained in the Group's culture and DNA.

“Current economic developments, the importance of accumulating sufficient savings for retirement and wealth transfer are particularly topical at the moment and the seminar provided a platform to address these areas as well as other financial services related subjects”, said Nalty.

The Seminar was promoted as an Economic Update and for the convenience of the clients was split into two sessions – lunchtime and evening. The speakers included –

**Patrick Nalty** – Managing Director Paradigm Group

**James Mirams** – Head of Wealth, Paradigm Group

**Martin Ryan** – Director Mutual Limited & member of Paradigm Group's Independent Investment Committee

**Roger Walling** – Portfolio Manager, Ralton Asset Management.

Representatives of the independent investment committee that oversees Paradigm's Managed Account Service (PMAS) were in attendance and provided an overview of the range of portfolios and overarching investment philosophy. They stressed the importance of choice and flexibility of investment portfolios without the ongoing administrative burden as key to maximising returns and for PMAS's success.

The subject of intergenerational wealth transfer generated significant interest and discussion and in response Nalty confirmed that it will be the topic of the next seminar series.

“For many Australians that are approaching retirement, the passing on of assets and legacy of decades of endeavour to their families is a huge concern and must be executed properly if these aspirations are to be realised”, said Nalty

These seminars will be kept small in size for the comfort of clients and so that the speakers can interact with the attendees in a relaxed but professional environment that facilitates discussion with plenty of time for Q&A.

A broad range of topics will be addressed in these intergenerational wealth transfer seminars including tax implications, use of testamentary trusts, beneficiaries that may be at risk due to marriage failure of children, etc.

“Financial services will always be a P2P business as long term wealth creation, retirement, intergenerational wealth transfer and protection strategies require an intimate understanding and appreciation of the very personal goals and objectives of each and every individual client”.

“Seminars are an excellent opportunity to engage and strengthen the bond with our clients, increase awareness, educate and demystify financial services”, concluded Nalty.

**ENDS**

**Issued by Paradigm Wealth Management      [www.paradigmwmm.com.au](http://www.paradigmwmm.com.au)**

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**Pictured below:** Patrick Nalty welcoming clients to the Paradigm Investment Seminar and attendees networking with event speakers

