

The West Australian



Shaw and Partners' Western Australian team.

Delivering knowledge, vision and purpose

AT a turbulent time for many in financial services, experienced investment and wealth management firm Shaw and Partners has bucked the broader trend and committed to a strong future in Western Australia.

The pre-eminent financial firm, which has more than \$18.5 billion under its administration nationally, recently took on new office space at 108 St Georges Terrace and is rapidly growing its 40-strong staff footprint in Perth.

Staff on St Georges Terrace offer tailored advice and investment solutions, financial planning and corporate advisory services, working closely with clients to target their individual needs and develop long-term relationships, while providing detailed knowledge of local conditions.

“Partnerships are built on trust and delivering on promises. Honesty and integrity are at the core of our client relationships.”

Shaw and Partners Co-CEO Earl Evans

“Our advisers are WA born and bred,” Shaw and Partners WA State Manager Davide Bosio said.

“They know and understand the local marketplace and are highly regarded by their clients.”

The firm is well-established nationally, with more than 180 advisers channelling 30 years of experience to provide financial roadmaps and assist clients in

meeting their goals. These advisers uncover investment opportunities on the back of evidence-based analysis, while managing the risks which come with investing.

While Shaw and Partners provides the intimacy and security of a boutique investment firm, it is backed by the resources and scale of a major financial group in the form of Swiss private bank EFG International. This means exposure to global opportunities from a locally accessible service offering.

Shaw and Partners Co-CEO Earl Evans said every client was held in the highest regard.

“We treat each and every client as a partner,” he said.

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Shaw and Partners is not just committed to WA through its expanding local business presence. The company also supports a variety of organisations which

promote innovation and growth, and is committed to giving back.

In November in Perth, Shaw and Partners will sponsor The Doctor race, a famous 27km open-ocean surf ski race starting at Rottnest Island and finishing at Sorrento Beach. The race attracts around 500 participants and is part of the Australian Ocean Racing Series (AORS), the iconic national ocean racing contest founded by WA local Dean Gardiner.

The series attracts competitors across a range of ocean racing disciplines, including ocean surf skis, stand-up paddleboards, prone paddleboards and outrigger canoes. Shaw and Partners has been its major sponsor for the past four years.

The firm’s commitment to the communities in which its staff live and work is further shown through its Shaw and Partners Foundation – a philanthropic arm which has donated more than \$2.5 million to Australian charities since its inception in 2015.

Mr Bosio said Shaw and Partners staff were instrumental in carrying out the foundation’s mission to create real change in Australian society, and had been its driving force from a fundraising and administrative perspective since day one.

“The broader philanthropic and sponsorship engagements of our firm have proven to be a galvanising force amongst our staff,” he said.

“It speaks volumes about the people that form the core of Shaw and Partners.”

In a post-banking royal commission environment, where many big international firms have left the country and other small firms have struggled, Mr Bosio said Shaw and Partners had focused on things within its control – empowering staff, providing a holistic offering to clients and ultimately delivering on their goals.

In times of technological advancement, automation, economic change and industry disruption, the group has developed the depth of knowledge, clarity of vision and strength of purpose needed to work side by side with its clients.

“It’s about precise execution across these four pillars,” Mr Bosio said. “We do it well.”

Shaw and Partners’ recent Perth growth is testament to this point.



Left to right: Earl Evans, Co-CEO, Davide Bosio, State Manager WA, and Allan Zion, Co-CEO.

Shaw and Partners
an EFG company

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To arrange an obligation free, initial consultation, contact our office today.

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