INDEPENDENT FAMILY OFFICE SERVICES

EWM GROUP

Managing wealth is not simply about making the right investment choices. It is equally important to invest time in protecting the family legacy, education, family unity and managing relationships.

Business success or substantial inheritance brings responsibility and requires the skills of multiple service providers. At EWM Group, we help our clients manage those providers and handle a myriad of financial, investment, family and lifestyle considerations. Very few organisations can attest to having the independent expertise sufficient to meet such needs.

As an organisation that prides itself on its independence, EWM Group does not sell investment and financial products. Through working with our clients and their advisors, we help ensure their wealth is protected and managed for the benefit of current and future generations. Our clients retain full control of all decisions, gain access to best of breed opportunities globally, and have an advisory team working in unison for the benefit of their family.

We invite you to consider making our Family Office your own.

> *Brad Scott from EWM Group was instrumental in the formation of our family governance framework. Brad's courteous and respectful manner allowed him to determine each family member's level of understanding, and ensure that all issues no matter how small or inconsequential were dealt with. Brad listened carefully, and provided the critical neutral position that is a necessity in dealing with family matters. Most importantly, Brad encouraged our family to take ownership of the development of our family governance framework, and continues to provide us with relevant and timely advice in its ongoing evolution. I highly recommend Brad Scott and the services of EWM Group.*

Founder, National property business

OUR VISION

To be the first choice for successful individuals and families seeking a trusted and independent family office.

OUR MISSION

To protect our client's financial, family and social capital for the benefit of current and future generations.

In partnership with our clients and their advisors, we design, implement and manage a clear strategic vision across all areas of our client's lives.

Our goal is to save our client's time and money, and add value in everything we do.

OUR VALUES

▲ Independent ▲ Discreet ▲ Bespoke ▲ Collaborative ▲ Proactive

In my busy schedule, it is imperative that I have a reliable team of people around me who can work together as a cohesive advisory team while working closely with my family and I. Brad Scott has been a friend and trusted adviser since 2001 and fills that role. Brad's assistance in advising, structuring and managing my investment strategy, family governance and philanthropic activities has been invaluable. Add to that a comprehensive and timely reporting, bookkeeping, bill paying and administrative service, and I would have no hesitation in recommending Brad and the EWM Group team.

Australian sportsperson

HISTORY OF EWM GROUP

EWM Group was the first national multi-family office headquartered in Queensland and was established in 2005 by founder and Managing Director, Brad Scott.

A small group of successful Australian entrepreneurs expressed to Brad their desire for an independent resource to structure and oversee their needs in unison with their existing advisors. As a result, EWM Group was established to provide a trusted adviser to manage and coordinate the financial, investment, family, lifestyle, philanthropic and wealth transition needs of multiple families.

Since its inception, EWM Group has grown to manage a diverse range of clients and has built a reputation as one of the leaders in the Australian Multi-Family Office landscape.

Clients include current and former business owners, Chief Executives of listed and unlisted companies, Single Family Offices, International Sports and Entertainment identities, inheritors of wealth, Philanthropists, Traditional Owner groups and Not-For-Profit organisations.

In our very active and busy lives we do not always pay enough attention to some aspects of our financial needs and. requirements Brad Scott and the team at EWM Group act as our extra eyes and ears and watch over our affairs in a professional manner.

Former CEO of an ASX Listed Top 20 Company

BRAD SCOTT

FOUNDER AND MANAGING DIRECTOR

Brad Scott is the founder and Managing Director of EWM Group and has been in the finance and investment industry since 1986.

Prior to forming EWM Group, Brad held the position of Executive Director of Goldman Sachs JBWere, where he jointly established and managed the Private Wealth Management business in Queensland. Prior to that, Brad spent 12 years with one of Australia's major banks in various commercial, private banking and management roles.

Brad's experience includes relationship and investment management, commercial, private and investment banking, family governance and education, and philanthropic advice. His clients have predominantly been affluent individuals, multi-generational families and the not-for-profit sector.

Brad holds qualifications in Accounting and Business (Banking and Finance) from Queensland University of Technology and is a member of the Australian Institute of Company Directors.

Brad is actively involved in philanthropy and social investment, including holding advisory board positions with a select group of private and public organisations, foundations and indigenous groups.

SERVICES

At EWM Group our clients' needs vary due to their unique financial position, background, goals, timeframes and individual and family circumstances.

Our service offerings differ and are specifically tailored to reflect the immediate requirements for each client and family group and are flexible to accommodate changing lifestyles. As a consequence, our fee structure is tailored for each client. EWM Group's clients have access to a wide range of services. Individual or multiple services are selected, depending on requirements and interests, and can be revised at any given point in time. The tailoring of our service offering and fee structure ensures each client can find the most cost effective option for them and then vary this as required.

Our service offering includes but is not limited to:

- Family Coaching, Governance and Education
- Wealth and Asset Management
- Financial and Investment Governance
- Philanthropic Services
- Corporate Advisory
- Risk and Lifestyle Services
- Reporting and Administration.

No two families are the same. Since our inception we have responded to a diverse range of requests. We pride ourselves on our commitment to solving problems, managing individual requirements as they arise and saving our clients time and money.

PROTECTING A LEGACY

History is riddled with stories of substantial family wealth and businesses that have been damaged (or destroyed) through family disputes. Global research has shown that these are the origins for why 70 percent of attempted wealth transitions fail.

At EWM Group, we work with clients, their family members and advisers in implementing a strategy and pathway to assist in the successful transition of family wealth, culture and values to the next and future generations.

To support this process EWM Group coordinates the advice, documentation and establishment of a suitable and relevant governance structure for each family. This helps in managing expectations of multiple generations. This structure can include education for family members and the facilitation of family meetings and retreats. It may also include preparation, facilitation, and review of a Family Constitution, as well as family councils and advisory boards.

Many successful individuals and families incorporate Philanthropy into their family legacy as a means of education and to pass on or create family values. In most cases, this strategy provides the ‘glue’ that binds a family together.

EWM Group provides specific resources and expertise to support our client’s philanthropic goals. We provide structural advice and strategy setting as well as project and grant management. Our service includes sourcing and managing grant recipients and providing support in the financial management, administration and compliance of our client’s chosen charitable giving vehicles.

EWM GROUP

Brisbane Office

Level 4
99 Creek St
Brisbane QLD 4000

PO Box 2128
Fortitude Valley BC
QLD 4006

Tel: +61 7 3845 2900
Fax: +61 7 3845 2999

admin@ewmgroup.com.au
ewmgroup.com.au