



LIPMAN BURGON & PARTNERS

## Media release

Monday, 16 November 2015

### **Robert Lipman re-brands to reflect growth, new leadership structure**

Sydney-based wealth management firm Robert Lipman & Associates has announced a name change to Lipman Burgon & Partners in line with the appointment of Paul Burgon to Managing Director, effective 1 January 2016.

Lipman Burgon & Partners advises more than 150 of Australia's wealthiest individuals and families with over \$700 million in funds under advice.

Founding partner and current Managing Director Robert Lipman will be elevated to the role of Executive Chairman, where he will remain Chair of the Investment Committee and have ultimate responsibility for the quality of advice and uniformity of approach within the business.

In line with a business succession plan, he will gradually transition to a Non-Executive Chairman role by 2020.

"Internal succession planning is crucial to ensure we maintain the same high standard of service and advice that our clients have come to expect from us over many years," Mr Lipman said.

"Current director Paul Burgon will move into the role of Managing Director in line with his extensive experience in private wealth management in investment houses such as Goldman Sachs JBWere and Investec Private Bank.

"Paul is an outstanding contributor to our business and is a significant shareholder within it. I can't think of anyone better to lead our vibrant, expert team into the future as we continue to grow."

Mr Burgon is widely recognised in the industry for his expertise in wealth structuring, investment management, executive remuneration, philanthropy and intergenerational wealth transfer for sophisticated clients with complex affairs.

Mr Lipman established his business as the wealth advisory arm of Investec Bank (Australia) Limited in 2000. In 2011, Mr Lipman and Mr Burgon acquired the business from Investec to form Robert Lipman & Associates.

Mr Burgon said Lipman Burgon & Partners will continue to cater specifically to Sydney's high net worth market into the future.

"We understand the importance of combining advanced planning with sophisticated investment management. That's why we can provide a compelling service that caters to the nuances of this market segment," he said.

“This is a fantastic time to be a boutique privately-owned wealth management firm. Investors are demanding more accountability, conflict-free financial advice, and better customer service – on top of superior portfolio management.”

Lipman Burgon & Partners is also formalising a mentoring program for its staff to ensure the same uniformly high standard of research and advice is received by clients, irrespective of which adviser they choose.

“We are a business built around people and we take immense pride in the deep, personal relationships we have forged with our clients over many years. The Lipman Burgon mentoring program is part of our commitment to strengthen our advice and research capability for the benefit of our clients over the long term,” Mr Burgon said.

[ends]

**[1 Attachment: Lipman Burgon & Partners team photo]**

*From left: Diona Kearney, Tu Anh Duong, Annie Casey, Alexandra Just, Nilar Alom, Robert Lipman, Paul Burgon, Susan Lipman, Aileen Fabjancic, Iain Davidson, Hanna Oo, Heath Ueckermann.*

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