



LIPMAN BURGON & PARTNERS

Media release

Monday, 26 August 2018

Lipman Burgon & Partners appoints JP Morgan's Alex Pikoulas to new Investment Centre of Excellence

Boutique wealth management firm Lipman Burgon & Partners today announced the appointment of top institutional investing talent Alex Pikoulas to the newly created role of Portfolio Manager.

Mr Pikoulas has 20 years of markets experience in Australia and overseas, including eight years as an equity analyst in funds management and broking, and 12 years in equity sales at JP Morgan, Merrill Lynch and Deutsche Bank.

Lipman Burgon & Partners Managing Director Paul Burgon said the appointment was the latest in a series of new hires that would bolster the firm's standing in the disruptive boutique wealth management space.

"We are delighted to have Alex join the team. His institutional investment capability will allow us to further increase the level of sophistication of our offering to high-net-worth clients, who want access to unique opportunities that only a boutique firm can offer."

Mr Pikoulas said his decision to move from institutional wealth advice into the boutique space was market-led.

"High-net-worth individuals are increasingly seeking boutique wealth managers who can provide tailored and differentiated investment solutions. Creating an investment Centre of Excellence with institutional grade analytical and research capabilities provides a compelling offering to this growing market," he said.

Sydney-based Lipman Burgon & Partners advises a number of Australia's wealthiest individuals and families, and has more than \$1 billion in funds under advice.

In June 2018, Managing Director Paul Burgon was named among Australia's Top 10 Financial Advisers by US financial investment publication *Barron's*.

Mr Burgon said that as more advisers enter the boutique space from the big wealth management firms, business values and ethics would become an even greater differentiator.

"Clients want to understand that you can deliver the returns but also that you are choosing the best solution for them based on their individual needs," he said.

About Lipman Burgon & Partners

Lipman Burgon & Partners is a boutique wealth management firm based in Sydney (AFSL No. 234972). The firm manages more than \$1 billion in assets on behalf of high-net-worth individuals and families, associations, charitable trusts and foundations.

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Media enquiries:

Jasmine Hogg, Apollo Communications

0422 834 912