VANTAGE
WEALTH MANAGEMENT

Dedicated to being the leader in financial advice.

At Vantage, we're committed to making a meaningful difference to each of our client's financial wellbeing.

Client First

A recent leading independent survey of Vantage clientele and its services found we ranked in the top 10% of all financial planning practices in Australia.

(Business Health CATScan)

We put client best interests before our own at all times.

'Client first' is a cornerstone of our business demanding best practice and compliance to licensing conditions. Whilst internal and external auditing procedures ensure adherence to this principle, it is our culture that ensures this stays at the forefront of everything we do.

We are flexible in our service delivery, designing this specifically for client needs.

We listen to our clients and tailor our advice and investment solutions to suit their needs.

We encourage clients to protect their wealth and develop strategies to enable this.

In addition to strategic and investment advice we develop protection strategies using insurance and estate planning specialists.

We facilitate all areas of financial advice.

We partner with tax, legal advisers and other specialists to ensure all aspects of advice are carefully considered.

Private Firm, Private Control

Without external institutional ownership our success is completely aligned to the best interests of our clients.

Vantage operates under a privately owned license and is not influenced by institutional shareholders.

We own and maintain 100% control of our own Australian Financial Services Licence (AFSL) through VWM Financial Services Pty Ltd(VWM), holder of Australian Financial Services Licence No. 345744. The Directors of Vantage are also Directors and Responsible Managers of VWM.

We believe private ownership and control ensures ultimate focus on our clients best interests.

Vantage does not have any financial obligation to product providers or third parties that may influence our investment platform or insurance recommendations.

With management based in WA, we are proactive in addressing client issues in a more timely way.

There are no time or geographic barriers that inhibit us from responding quickly to client queries and market changes.

We direct support to local community projects.

We encourage and actively participate in boards and local community not-for-profit endeavours.

Our Team

For over 15 years we have been developing and nurturing our people to bring out their best.

Growth, development and teamwork are all characteristics we nurture in our people.

We provide opportunities for staff to grow their careers with us. This locks in valuable corporate knowledge to ensure our 'client first' culture remains alive and well.

Our people take pride in the future direction of the firm.

Our team actively share, contribute and genuinely care about the ongoing development of our services.

Our team at Vantage is what makes us unique.

Our staff tell us they appreciate a flexible workplace, ensuring people can grow personally as well as professionally through all phases of their lives.

The professionalism of our workforce is important to us.

We support professional development programs across our workforce to ensure we continue to provide quality advice services.

Our advisers are all members of the Financial Planning Association of Australia and hence commit to the association's code of ethics.

Investment Expertise

Client portfolio recommendations are extensively researched by our team of highly experienced investment professionals.

We maintain complete autonomy over our investment process and advice.

We employ experienced professionals with comprehensive governance and Chartered Financial Analyst (CFA) Institute qualifications which ensures our investment advice is targeted to client needs.

We deliver specialised investment outcomes and clarity in reporting to our clients.

Our investment solutions measure and report on portfolio performance against specific client objectives and industry benchmarks.

We overlay external research with our own extensive analysis. We will not rely solely on third party recommendations.

The Vantage Investment Committee oversees investment activities and our proprietary filtering process to construct our Approved Securities and Products list.

Established in 2008, we understand the impact stressed financial markets have and the need to be prepared for adverse conditions.

With over 100 years of combined investment knowledge and experience, we understand managing investment risk is as important as delivering an appropriate return.

Client First
Private Firm, Private Control
Our Team
Investment Expertise
Innovation

Innovation

Our commitment to investing for the future enables the capturing of strategic planning, investment and technology opportunities.

We are committed to best of breed strategic solutions.

We constantly engage leading industry specialists for advancement in technical, investment, systems and business strategy.

If it seems too good to be true it usually is. We investigate and stress test all strategic recommendations.

Vantage working groups are designed to encourage the sharing of ideas and exploration of progressive thinking in all aspects of our business.

We understand the status quo can lead to a false sense of security in a world of constant change.

Our investment in business intelligence and client engagement surveys keeps us abreast of the changing needs of our clients.

We strive to advance and develop a better advice industry for all participants.

Engagement in industry development programs promotes the sharing of ideas to improve industry standards.

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How can we help?

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