

Adam Dawes

Senior Investment Adviser



Adam Dawes

Senior Investment Adviser

Shaw and Partners

Level 7, Chifley Tower, 2 Chifley Square
Sydney NSW 2000 Australia

Telephone: +61 2 9238 1509

Mobile: +61 405 533 633

adawes@shawandpartners.com.au

"I specialise in constructing and managing Australian equity portfolios for high-net-worth and sophisticated investors. I work with individuals, families and businesses to provide effective solutions that preserve and grow wealth"

your MONEY

Finance commentator

In 2015 Adam was approached by yourMONEY / Sky News Business to become a regular commentator on equity markets and now co-hosts The Close and various other business and finance TV shows.

[View my LinkedIn Account](#)

[Download our Corporate Brochure](#)

[Watch our Corporate Video](#)

Adam Dawes is a Senior Investment Adviser and has worked at Shaw and Partners since 2003. Adam manages his clients' affairs with complete professionalism and dedication, achieving the best possible financial outcomes to meet clients' goals. In total, Adam has over 16 years of experience in wealth management, delivering investment advice on a wide range of areas, including equity trading, portfolio and risk management, bonds and superannation.

With a thorough understanding of financial markets and strategic long-term financial planning, Adam constructs and carefully manages the investment portfolios of a select group of private clients and sophisticated investors. Adam also works closely with accountants and financial planners to establish, manage and review their clients' investment strategies to deliver the best possible financial outcomes. His professionalism and attention to detail ensures clients' best interests are prioritised and their needs met. Adam's advice is intelligent and fully considered whether an investor is seeking to protect his wealth or achieve a high level of financial performance. His areas of expertise are broad and include:

- Provision of tailored personal advice
- Portfolio management and administration
- Fixed income strategies
- Investment advice to Self Managed Super Funds

Wealth Management Solutions

Adam's careful but proactive approach means he can manage clients' investments and recommend effective wealth generating opportunities for the long term. His success has been built on deep knowledge of asset markets, careful investigation of each client's goals and his extensive professional network, which enable him to access the latest ideas and recommend bespoke investment plans. Adam prides himself on his ability to form close and long-lasting partnerships with clients, to whom he offers the complete spectrum of stockbroking strategies tailored to build and preserve wealth. Adam backs all his recommendations with a full account of risks and rewards and solidifies his partnership with clients through diligent ongoing support and advice.

Adam's expertise encompasses equity portfolio construction. He can skilfully diversify portfolios across top quality Australian blue chip companies (ASX Top 50) through to mid-sized companies (ASX Top 200), backed by Shaw and Partners' specialist research in emerging and mid-cap companies. Adam uses exchange-traded funds (ETFs) and managed funds to diversify clients' portfolios. Adam can assist with:

- Asset allocation and risk management
- Dividend franking to yield income to supplement capital growth
- Tactical and strategic recommendations using Shaw and Partners' research
- Generate trading ideas focused on your investment goals
- Use of fundamental and technical analysis with charts

Qualifications

- Diploma of Financial Services
- ASIC RG 146, Accredited Derivatives Adviser (ADA 1+2)
- ASIC Accredited in Margin Lending & Geared Investments

Shaw and Partners is one of Australia's preeminent investment and wealth management firms. With a national presence and \$16 billion of assets under advice, Shaw and Partners offers the intimacy of a boutique investment firm with the resources and scale of a major financial group. We are privately owned and client focused, having helped our clients manage and grow their financial assets for more than 30 years. Our emphasis on integrity and stringent compliance standards has enabled us to achieve very high levels of client satisfaction, while unlocking opportunities of significant value. By working closely with our clients, we have forged long-term relationships. Whether you are a private investor, high net worth individual, charity, institution or corporate client, our focus is simple: listen to you then act according to your objectives.

Welcome to Shaw and Partners. Your partners in building and preserving wealth.

ShawandPartners

an **EFG** company

Sydney | Melbourne | Brisbane | Adelaide | Perth | Canberra