



Experienced financial services consultant / executive with a track record of success, "first principles" knowledge and revenue generation

- Highly developed technical, managerial, strategy and governance skills.
- Develops and leads effective business strategies with a "hands-on", intelligent approach.
- Vast industry knowledge with a focus on the wholesale and retail investment / wealth management markets from a local, Asian and global perspective.
- Proven track record as an energetic leader of highly motivated, loyal teams.
- Proven ability to build profitable new businesses in financial services.
- Highly developed communication and presentation skills.
- Excellent Excel and Bloomberg skills.
- Excellent sales and relationship development ability.
- Highly respected governance skills and knowledge of industry law (helped develop Super regulations with ISC).
- Creative thinker.

Career Overview

Brian Thomas B Ec. GAICD is currently Director – Consulting Services with Wealthadvice.

His current major assignment is with Rice Warner Actuaries researching business strategies for Financial Services businesses in a post Royal Commission environment. Prior to that he consulted as General Manager – Business & Investments at Eight Investment Partners (8ip). He was also previously General Manager – Investments at Perennial Investment Partners, Managing Director and Head of Distribution for Credit Suisse Asset Management and a Division Director at Macquarie Bank.

Brian has been in the financial services industry for over forty years specialising in superannuation and investment management covering administration, asset consulting, product development, marketing, distribution, asset allocation, people management and board directorship.

He has been an active participant in a number of industry bodies and government committees and was instrumental in the development of allocated or account-based pensions. At Macquarie he developed Australia's first individual longevity solution product and has developed or co-developed several products and or specialist campaigns that have individually raised more than one billion dollars in assets. At Perennial he conceived and pushed through the development of their successful Tactical Income Trust product which has grown to just under \$A3billion.

He was a member of Perennial's Asset Allocation Committee for their diversified funds, a Responsible Manager and a Director of their RE Company.

Brian is also a highly regarded public speaker and a regular industry commentator on investment, economic and wealth management issues.

Brian is also on the advisory board of a blockchain start-up.

Highlights and Achievements

- ✓ Initiating and growing Perennial's most successful new product in 10 years which has grown to just under \$3billion in six years.
- ✓ Member of RE Board at Perennial (to March '18) and active member of Asset Allocation Committee, Responsible Manager since 1998.
- ✓ Re-building Perennial's retail presence in Australia after taking over the retail distribution function from IOOF. Sales tripled in the first 2 years with lower staff numbers.
- ✓ Re-branding Perennial (from IOOF branding) with a creative "zero-fee" approach where marginal new sales revenue was significant
- ✓ Invited (at no cost) to present an investment market update each morning on the top-rated Alan Jones (2GB) program for over two years
- ✓ Establishing Australia's first complete STP (Straight Through Processing) based Master Trust on a unique arrangement with a major financial planning software provider
- ✓ Establishing and growing Credit Suisse Asset Management's Asia ex Japan presence and overseeing Global Marketing as part of the Global Marketing committee
- ✓ Successfully building Credit Suisse Asset Management's retail business in Australia ahead of budget with Assets growing to \$5b and quickly creating a brand that was rated highly by Financial Planners
- ✓ Part of CSAM's Australian Executive Committee and a Responsible Officer since 1998.
- ✓ Co-authoring the highly regarded "Hypercompetition" industry papers
- ✓ Assisting the Government in the drafting of the SIS Superannuation regulations.
- ✓ Establishing Australia's first "longevity risk" product, the "Protected Pension Option" that paid an indexed income stream if the client lived beyond a specified period
- ✓ Establishing and growing Macquarie Bank's Superannuation and Allocated Pension business ahead of budget – The Macquarie Superannuation product quickly became more profitable than Macquarie's CMT
- ✓ Establishing the Australian Retirement Income Streams Association which lobbied successfully for the endorsement of Allocated Pensions as a legitimate product
- ✓ Leading the Superannuation sales team at Capita that achieving record new business results
- ✓ Setting up one of Australia's first Industry Superannuation Funds
- ✓ Excellent feedback from industry speaking engagements including FPA, ASFA, MLC, various dealer groups and conferences etc
- ✓ Establishing a Financial Services charity, "Corners for Kids" with IFSA and FPA that has been running for 15 years and supports youth charities