# Adam Humphries

## Private Wealth Manager

Having graduated from Leeds University with a Bachelor's degree in Business, I began my career in financial services by completing my CeMAP mortgage qualifications, enabling me to work as a Mortgage Adviser.

After several years of providing mortgage advice, I had the opportunity to relocate to Kuala Lumpur, Malaysia, as a coordinator and paraplanner. I thoroughly enjoyed my time there, having the chance to travel, experience new culture, and broaden my perspective both personally and professionally.

Following nearly six years in Malaysia, I returned to the UK to deepen my financial knowledge. I completed several financial exams and achieved the Diploma in Financial Planning (APFS) from the Chartered Insurance Institute (CII). Shortly after, I accepted a paraplanning role in the South of France with Blevins Franks Wealth Management, the largest expatriate advisory firm in Europe.

To further my career, I later relocated back to the UK and took on a role as a Financial Adviser. It was a pleasure to be closer to my family again, especially during the festive season when I enjoy helping out on their Christmas tree farm, something that brings both joy and a sense of tradition.

Malaysia always held a special place in my heart, and when the opportunity arose to return as a Private Wealth Manager with Melbourne Capital Group, I seized it without hesitation.

Today, I provide holistic financial planning to clients from around the world, helping them achieve their financial goals with clarity and confidence. My mission is to give clients peace of mind, ensuring both their present and future, along with their families', are financially secure. I specialise in tax-efficient strategies and the unique opportunities available to expatriates. My philosophy is simple: deliver high-quality, honest advice. In turn, my clients often introduce me to others in their networks who could benefit from an initial conversation.

Outside of work, I'm passionate about sport. I regularly swim, go to the gym, and follow global sporting events. I also value quality time with friends and family. When back in the UK, I always make time to return to the Christmas tree farm, braving the cold to enjoy the warmth of family and community spirit during the festive season.

## Contact Details

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# Adam Humphries

## My Qualifications and Experience

I attended the University of Leeds Beckett University and received BA (Hons) Business Creation and Enterprise.

These are all of the certificates and qualifications I hold from the Chartered Insurance Institute of the United Kingdom:

- CII DipPFS - Diploma in Financial Planning (Non-UK)
- R01 Financial Services, Regulation and Ethics
- R02 Investment Principles and Risk
- R03 Personal Taxation
- R04 Pensions and Retirement Planning
- R05 Financial Protection
- R06 Financial Planning Practice
- Award in Financial Planning (Non-UK)
- IFS Level 3 Certificate in Mortgage Advice and Practice (CeMAP)

These are all of the certificates and qualifications I hold from the International School of Finance:

- Level 3 Certificate in Mortgage Advice and Practice

As an award-winning and Chartered Institute of Insurance (CII) International Professional Partner Firm, we are committed to upholding the highest professional standards.

# Adam Humphries

## My Testimonials

"I needed advice regarding a received inheritance. Having not received financial advice previously, I was a bit sceptical; however, Adam guided me through the options available, and I now know my inheritance proceeds have been put to good use and are in safe hands."

"The service was professional, clear, and not misleading."

**Kevin**
*Building Manager*

"I acquired Adams advice on my current investment portfolio. The guidance given was excellent, and I was able to consolidate my investments into one actively managed investment portfolio. I feel the returns in the long term, along with the time saved managing my own funds, will be beneficial to achieving my retirement targets."

**Matthew**
*Head of Pricing Services*

"Adam helped with retirement planning. I had spoken to previous advisers in the past; however, I did not proceed with any advice due to the trust aspect. When meeting Adam, I felt he was honest and took the time to fully understand my current situation and future goals. I now feel secure. I have my retirement plan on track."

**Tim**
*Business Owner*

"Adam helped me with my pensions; his research was thorough, and the advice was easy to understand. I am reassured now that my pension portfolio is now being actively managed effectively, and I am on course to reach my retirement objectives."

**Chris**
*Mechanical Design Engineer*

"I needed advice on various financial planning aspects, in particular inheritance tax planning. Adam was able to guide me through and make the process simple and understandable. I would recommend anyone to Adam, as he is trustworthy and loyal to his word."

**Mike**
*Business Owner*

"Clear advice and guidance on my pension planning. My pension is in a better place, and I feel more secure regarding my retirement goals."

**Patrick**
*Product Manager*

"The value of advice and support from Adam in helping us with retirement planning was second to none. He is always available to answer questions and is committed to the best advice for the client."

**Keith**
*Retired*

"Adam explained the various investment options available to me for investment. The process was smooth, clear, and transparent. I know my portfolio is being managed professionally for the benefit of my future beneficiaries."

**Lesley**
*Retired*

"I've had a great experience working with Adam Humphries on the investment options. Our conversations have been incredibly valuable.He took the time to understand my personal goals and offered a broader, more strategic perspective on wealth management and long-term planning. His insights helped me refine my approach and paved the way for more informed decisions in the future. I truly appreciate the professionalism, clarity, and thoughtfulness he brought to every interaction.

**Dmitriy**
*Officer*

# Who are my clients?

## Hotel
- General Manager
- Senior Commercial Manager

## Interior Designs and Architecture
- Business Partner

## Logistic
- Director
- Manager

## Media
- Associate Director of Technology
- Office Manager
- TV Sports Presenter

## Oil and Energy Industry
- Mechanical Supervisor
- Oil Field Engineer
- Senior Service Engineer

## Research
- Clinical Research Associate
- Deputy Director
- Head of Chemical Development
- R&D Manager
- Scientist

## Software Technology
- Business Director
- Director (Healthcare)
- Chief Executive Officer
- Product Manager
- Regional Director
- Senior Director
- Senior Marketing Communications Manager
- Training Development Manager
- Vice President

## Telecommunications
- Regional Project Manager
- Vice President (Sales)

## Trading
- Director - Business Development
- Grain Trader
- Senior Officer

## Automotive
- Extranet Planner

## Banks
- Chief Financial Officer
- Director
- Head of Asia Relationship Credit Group
- Head of Compliance
- Managing Director - Head of Asia Compliance
- Vice President

## Business Development and Consultancy
- Director
- Head of Crisis and Security Management
- Managing Director
- Principal Consultant
- Senior Business Analyst
- Senior Counsel (Group Legal Services)

## Design and Manufacture
- General Manager
- Senior Manager

## Education
- Associate Professor
- Professor
- Teacher
- Vice Principal

## Engineering
- Commercial Manager
- Commercial Director
- Piping Designer
- Procurement Manager
- Project Manager
- Senior Architect
- Senior Project Engineer

## Finance
- Chief Information Officer
- Financial Analyst
- Senior Manager

## Freight
- Director
- General Manager
- Group Technical Director

## Healthcare
- Business Director, Singapore
- Physiotherapist
- Regional Manager Consulting, Asia Pacific
- Vice President (Quality), Asia Pacific

## Wholesales/Distributor
- Managing Director

# Empowered by an Exceptional Team

My success is built on the expertise, dedication, and support of an exceptional team.

## Kaz Nishad

As the Head of Business Development, Kazi Nishad helps to chart the strategic course of the business growth here at Melbourne Capital Group. He manages and works closely with his team to identify new opportunities for client, nurture ongoing relationships, and drive excellence.

By forging strong partnerships and understanding our clients' needs, Kazi enables the team to deliver tailored solutions that not only meet but exceed expectations.

## Sam Marsden

As a Senior Relationship Manager at Melbourne Capital Group, Sam Marsden has been integral in forging close ties with both individual and corporate clients across the globe. His expertise revolves around bridging the gap between specific needs and matching those needs with a variety of bespoke solutions that Melbourne Capital Group has to offer. Sam assists clients our adviser team and enhances the high-quality service we deliver.

## Julian Lau

As the Client Services Operations Manager, Julian Lau has played a pivotal role in developing and refining the client onboarding and servicing experience. He coordinates closely with Private Wealth Managers and fellow team members to ensure that the requirements for each client recommendation are clearly outlined and efficiently executed. He coordinates closely with Private Wealth Managers and fellow team members to ensure that the requirements for each client recommendation are clearly outlined and efficiently executed.

## Melissa Lau

As the Head of Marketing, Melissa Lau is the architect behind the firm's marketing strategy and public engagement. She orchestrates all online and offline marketing initiatives, from the first digital impression to the last printed material, ensuring a cohesive and informative experience for clients.

# How can we help?

We provide you with a tailored strategy to help you achieve your financial goals.

**Our strategy will focus on:**

| | |
|---|---|
| Growing your Wealth | • Building Wealth<br>• Managing Investments<br>• Managing Existing Assets |
| Structuring your Wealth | • Optimising Tax Efficiency<br>• Refinancing<br>• Pension Consolidation and Simplification |
| Protecting your Wealth | • Life Insurance<br>• Health Insurance<br>• Critical Illness Cover<br>• Estate Planning<br>• Will Writing |
| Goal-based Planning | • Education Planning<br>• Retirement Planning<br>• Inheritance Tax Planning<br>• Lifetime Cashflow Modelling |

**Our Approach:**

| | |
|---|---|
| 1 | • Quarterly service meetings<br>• Quarterly discussion with in-house fund researcher |
| 2 | • Quarterly fund portfolio updates<br>• Quarterly unit statements |
| 3 | • Personalised fund research<br>• Personalised fund portfolio |
| 4 | • In-house handling of any changes, e.g.<br>    o Change of address/e-mail<br>    o Bank details<br>• 24 to 48 hour handling response to all queries |

# Giving Back to the Community

We believe wealth should be used as a tool to bring about positive change. This belief forms a central tenement of our operations and sees us support various charities and community initiatives by fundraising, donating and hosting events.

### Charity Work

The Lost Food Project is an organisation dedicated to reducing food waste and providing nutritious meals to those in need, supporting both environmental sustainability and local communities. Our team sorted rescued fresh produce for distribution. We helped to rescue 3,283 kilograms of food, providing 9,380 meals and reducing carbon emissions by 8,208 kilograms of $CO_2$.

As main sponsors of the Inter-Society Golf Tournament, we helped raised RM20,000 for the Malaysian Association of Paediatric Palliative Care.

We pride ourselves in supporting various associations and have contributed to various fundraisers for The Selangor St. Andrew's Society, The Royal Society of St. George, Association of British Women in Malaysia, The Malaysia British Society and more.



### Community Outreach

We offer financial literacy workshops to school students and teachers through partnerships with International Schools in the region.

Melbourne
Capital Group

# Contact

## Start achieving your financial goals.

www.melbournecapitalgroup.com

info@melbournecapitalgroup.com

### International Offices

*Simply scan the QR code below to get directions to our offices.*

**Kuala Lumpur**

UOA Corporate Tower, Bangsar South,
Kuala Lumpur, Malaysia.

**Penang**

Straits Quay, Tanjung Tokong,
Penang, Malaysia.

**Bangkok**

Two Pacific Place,
Sukhumvit Road, Bangkok, Thailand.

**Melbourne**

Collins Street, Melbourne,
Victoria, Australia.

Trustpilot

Scan to view our reviews