



# Jake Mowson

## Private Wealth Manager

My name is Jake Mowson and I am a Private Wealth Manager with Melbourne Capital Group, based in Kuala Lumpur, Malaysia. I educate and guide people with planning their finances and structuring their wealth.

I am originally from the UK and have been living in Malaysia for nearly 10-years. I am married to my Malaysian wife, and we have 2 young boys together. Living in Malaysia brings me a lot of joy; the people are nice, the food is great, the weather is amazing, and the standard/cost of living is exceptional. I love the outdoors and spend my spare time hiking in the jungle or trail running with friends. I also play a lot of racket sports, and more specifically squash.

I have numerous professional qualifications which has helped me to progress in my career, and I am a huge advocate of continuous professional development where learning and developing new skills allows me to excel in a variety of different aspects.

As an expat myself, I am well versed in the common requirements that expats have. That being said, I'm also fully understand that every client has different needs and there is never a one-size-fits-all approach, therefore I always take time to understand my client's needs before providing a possible solution, while having a strong focus on longevity.

I plan to be in the Asia region for the long-term, at least while my kids are growing up, and I look forward to the rewarding challenges that await me in both my personal and professional career.



## Contact Details

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[Jakemowson@melbourncapitalgroup.com](mailto:Jakemowson@melbourncapitalgroup.com)

# Jake Mowson

## My Qualifications and Experience



**UNIVERSITY OF  
PLYMOUTH**

I attended the University of Plymouth and received BA, International Relations and Economics



**CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENT**

These are all of the certificates and qualifications I hold from the Chartered Institute for Securities & Investment of the United Kingdom:

- International Certificate in Wealth & Investment Management



**Chartered  
Insurance  
Institute**

Standards. Professionalism. Trust.

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

- RO1 - Financial Services, Regulation & Ethics
- RO2 - Investment Principles and Risk
- RO4 - Pensions and Retirement Planning
- RO5 - Financial Protection
- AWF - Award in Financial Planning
- AWP - Award in Financial Planning

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



**Melbourne  
Capital Group**



**EAST ASIA**  
**BEST ADVISER FIRM**



**EAST ASIA**  
**EXCELLENCE IN BUSINESS STRATEGY**



**EAST ASIA**  
**EXCELLENCE IN  
PROFESSIONAL DEVELOPMENT**

# Jake Mowson

## My Testimonials

“Excellent financial advice and service from Jake Mowson. He took the time to understand my financial goals and came up with great investment proposals for myself. He’s very quick to respond and will always make himself available for any inquiries or questions I may have. Highly recommend!”

### **Cristophe**

*Accounting Associate*

“Hello, I wanted to share my very positive experiences to date with Jake Mowson's team at Melbourne Capital Group KL office. They did a fantastic job in sorting out all the mess and loose ends of a legacy portfolio set-up and then left unmanaged by previous financial consultants. And they also did a fine job in transferring to an Arden platform and advising me on the most robust and cost-effective investment options available in the market. Most recommended!!”

### **Arnout**

*Geoscientist and Energy Consultant*

“Highly recommend Jake from Melbourne Capital as a financial advisor. Jake took ample amount of time and visits to explain fully the various options for long-term saving plans, explaining in detail the pros and cons of each option and was very transparent with the costs involved. The support received after making the investment decision has also been great.”

### **Frazer**

*Regional Manager, Oil & Gas.*

“Great firm. Very knowledgeable and customer oriented. Jake Mowson has kept me updated throughout the whole process and is very skilled at what he does. Highly recommend”

### **Floris**

*Microsoft Licensing Consultant.*

“I can personally attest to the professionalism and high standards of integrity that Jake of Melbourne Capital Group displayed when engaging with him recently. I would not hesitate in recommending him to anyone in need of an initial consultation”

“Have been dealing with Jake at Melbourne Capital Group for some time now, he is always very proactive and provided great advice. Highly recommend.”

### **Matthew**

*Managing Director*

“Melbourne Capital Group is a very professional outfit. Have been dealing with Jake Mowson who’s proactive & knowledgeable.”

### **Aditya**

*Founder and Managing Director*

"Jake and the Melbourne Capital Group team have provided me with outstanding support since changing provider. His support and guidance is well considered, providing holistic support as an expat living in Malaysia. I would highly recommend Jake and Melbourne Capital Group."

### **Simon**

*Global Data Science and Engineering Lead*

# 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
- Managing Investments
- Managing Existing Assets

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### Structuring your Wealth

- Optimizing Tax Efficiency
- Refinancing
- Pension Consolidation and Simplification

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### Protecting your Wealth

- Life Insurance
- Health Insurance
- Critical Illness Cover
- Estate Planning
- Will Writing

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### Goal-based Planning

- Education Planning
- Retirement Planning
- Inheritance Tax Planning
- Lifetime Cashflow Modelling

## Our Approach:

- |   |  |
|---|--|
| 1 | <ul style="list-style-type: none"><li>• Quarterly service meetings</li><li>• Quarterly discussion with in-house fund researcher</li></ul>  |
| 2 | <ul style="list-style-type: none"><li>• Quarterly fund portfolio updates</li><li>• Quarterly unit statements</li></ul>   |
| 3 | <ul style="list-style-type: none"><li>• Personalized fund research</li><li>• Personalized fund portfolio</li></ul>   |
| 4 | <ul style="list-style-type: none"><li>• In-house handling of any changes, e.g.<ul style="list-style-type: none"><li>◦ Change of address/e-mail</li><li>◦ Bank details</li></ul></li><li>• 24 to 48 hour handling response to all queries</li></ul> |



# 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 organization 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 CO2**.

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.



# Contact

**Start achieving your financial goals.**

[www.melbournecapitalgroup.com](http://www.melbournecapitalgroup.com)

[info@melbournecapitalgroup.com](mailto: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