



# Luke White

## Private Wealth Manager

Hi there, I'm Luke, a Private Wealth Manager at Melbourne Capital Group. My journey in the world of finance began with a degree in Business and Financial Management from Sheffield Hallam University. Over the past eight years, I've had the privilege of residing and working in Malaysia, specialising in offering expert guidance to expatriates on various facets of financial planning.

I take pride in providing personalised advice in the fields of investments, retirement planning, and insurance. I collaborate with my clients to create custom strategies to help them achieve their financial goals. Becoming a parent last year has also deepened my understanding of the importance of having a robust financial plan in place.

Outside of my professional and family lives, I'm an enthusiastic sportsman, representing KL Vikings in football and passionately supporting Oxford United Football Club. I also prioritise fitness and have completed various endurance challenges, including Tough Mudder, the Oxford Half, and the London Marathon.

As your trusted financial planner, I am dedicated to assisting you in realising your financial aspirations. Your peace of mind and financial security are my highest priorities. Let's collaborate to construct a financial plan that leads to a bright and worry-free future.



## Contact Details

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# Luke White

## My Qualifications and Experience



I attended the University of Sheffield Hallam and received BA, Business and Financial Management



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

- Level 3 Certificate in Wealth & Investment Management
- Level 4 Certificate in Advanced Wealth Management



These are all of the certificates and qualifications I hold from the Asian Insurance Institute:

- Certificate Examination in Investment Linked Life Insurance
- Certificate in Life Insurance AC



These are all of the certificates and qualifications I hold from Financial Planning Association of Malaysia:

- Certified Financial Planner

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



Helping you achieve your financial goals.

# Luke White

## My Testimonials

"I've had a brilliant experience with Melbourne Capital Group. For a complete novice like me, I needed plenty of time, guidance and support to feel equipped and knowledgeable in order to make a safe financial step forward. Luke White provided all of these and the impartial advice that he has given thus far has been thorough and pragmatic."

### Madeleine

*Teacher*

"The advise and support provided by Luke White at Melbourne has been fantastic. He spent time to ensure all options were understood and provided expert advise on the best direction for me. Would highly recommend Melbourne's services to others."

### Andrew

*Engineer*

"Luke has been both patient and perceptive. Listens well which is really important to me when talking to an advisor. His knowledge of the markets has been reliable and helped me steer away from unwise choices."

### Malcolm

*Regional & Global Trade Development Leader*

"I have known Luke for several years he is a very dedicated and professional financial advisor. He is very knowledgeable on financial investments and market trends. I highly recommend him."

### John

*Director*

"I have been working with Luke White at the Melbourne Capital Group for just over a year now. He has helped simplify my understanding of pensions and has advised me on the options for my UK based pensions. I highly recommend his services as an advisor and to explain things in layman's terms."

### Muhunathan

*Compliance Manager*

"Since using MCG and specifically Luke White, an existing account is performing better and a new product he recommended better than I hoped. Moreover, the advice received is appreciated as it's well balanced, considers comfortable levels of investment and not at all pushing to take on new accounts. Glad to have made the change to Luke's support."

### Phil

*Engineering Director*

"Luke White made it easy for us to set up our investment portfolio and get started with this managed investment. He patiently answered all my questions to help me reach a decision and invest confidently."

### Jan

*Geophysics Lead*

"I had the pleasure of meeting Luke 4 years ago and made the right decision of having him look after my financial investments. Luke is a great advisor, always up to date with market trends. I am 100% sure that with him my interests will always be looked after and most importantly he will respect any decision I make, albeit always providing his professional and honest opinion. I hope to continue to work with Luke for years to come."

### Pedro

*Revenue Management Specialist*

# 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

- Optimising 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

- Quarterly service meetings
- Quarterly discussion with in-house fund researcher

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2

- Quarterly fund portfolio updates
- Quarterly unit statements

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3

- Personalised fund research
- Personalised fund portfolio

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4

- In-house handling of any changes, e.g.
  - Change of address/e-mail
  - Bank details
- 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 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