



# Daniel Lees

## Private Wealth Manager

Coming from a small seaside town, my family has been in the fish 'n' chips business since John Lees brought fish 'n' chips to Manchester in 1863. Unfortunately for them, I always preferred finance to frying...

I knew I wanted to go into the financial planning profession, so instead of taking the university route like many of my peers, I joined the UK's largest wealth management company, St. James's Place. I gained valuable experience there but quickly recognised the limitations of being tied to a single provider. This led me to join a top independent firm, where I developed my expertise. During my time there, I also achieved my Diploma in Regulated Financial Planning from the Chartered Insurance Institute (CII) and became an active member of the Personal Finance Society. Since then, I've completed international exams with the CISI and am currently studying towards Chartered status with the CII.

Moving to Malaysia felt like a natural next step. With close friends and family in Southeast Asia, I plan to be in the region for the long term, as I've always felt a strong connection to it. When the opportunity arose to join Melbourne Capital Group, an independent firm committed to providing UK-standard financial planning to expatriates, it felt like a perfect fit with my background and expertise.

The UK standard is: if you do a good job for people, they'll naturally introduce you to others who could benefit from the same. That's how I've built my network, by providing clear, understandable, and reliable advice. My approach is goals-based, ensuring that every decision aligns with what my clients want to achieve. Working with expatriates from all over the world, I help them navigate the tax efficiencies and financial opportunities that come with living abroad. One tool I'm particularly passionate about is cash flow modelling, a way to map out your financial future in a clear, visual way. It's widely used in the UK but still relatively underutilised offshore, and I'm here to change that.

Outside of work, I like to keep active, whether it's playing sports or heading out on a hike. Travel is a big part of my life; having recently ticked Japan off the list, I'm always looking for the next place to visit. I also have a bit of an obsession with Fantasy Premier League, where I've ranked among the top 0.01% of players worldwide.



## Contact Details

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# Daniel Lees

## My Qualifications and Experience



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:

- Level 4 Diploma in Regulated Financial Planning
- R01 - Regulation & Ethics
- R02 - Investment Principles & Risk
- R03 - Personal Taxation
- R04 - Pensions & Retirement Planning
- R05 - Financial Protection
- R06 - Financial Planning Practice



CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENT

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

- International Certificate in Wealth and Investment Management
- International Introduction to Investment & Securities

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

# 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 | <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>• Personalised fund research</li><li>• Personalised 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 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 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.



Scan to view our reviews