



Michael Garcia

Private Wealth Manager

I'm Michael Garcia, a Private Wealth Manager in Kuala Lumpur with an unconventional journey. I'm originally from Whitefish Bay, Wisconsin, and began my working life as a golf caddy at 16. I had no idea that being a golf caddy would lead to receiving the Evans Scholarship at the University of Wisconsin, where I earned dual degrees in finance and insurance.

Not quite ready to join the corporate world, I pursued my passion for guitar at Musicians Institute in Hollywood, then taught guitar for 2 years in Seoul, South Korea. Returning to Wisconsin, I decided to utilize my degrees and found a job in wealth management in Kuala Lumpur after realizing how much I loved living abroad.

The first 7 years were like most other international advisors over here, I was helping expats of all different nationalities. Despite being American myself, I didn't work with other Americans because what worked for just about everyone else did not work for us.

When I joined Melbourne Capital Group in 2021, they introduced me to an international investment platform that was actually US compliant. As the only American advisor in Malaysia, it made sense to become the US expert and start helping Americans. We've since expanded what we can offer Americans and can help in so many more ways now. I still work with clients of all nationalities, but it has been great getting to meet and help so many Americans in this part of the world.

Malaysia has become my home, and I love traveling around Southeast Asia. The white sand and warm water of a nice beach in Thailand sure beats the dead fish and ice-cold water of the "beach" on Lake Michigan that I grew up enjoying. And I still get to go out on the golf course, only now as the golfer and not the caddy. I'll even hop on stage to join a band and play some guitar every now and then too. Somehow my love of golf and guitar led me to a job in wealth management in Malaysia, and I'm very happy that it worked out that way.



Contact Details

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Michael Garcia

My Qualifications and Experience



I attended the University of Wisconsin-Madison and received

- BBA in Risk Management and Insurance
- BBA in Finance, Investment, and Banking



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

I am a Private Wealth Manager with the Chartered Insurance Institute of the United Kingdom



I am a Private Wealth Manager with the Asian Insurance Institute

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.

Michael Garcia

My Testimonials

“Just writing to say a big THANK YOU for your support and efforts. And for being an excellent wealth advisor for these past few years :)”

Simone

Marketing Specialist

“I just wanted to say thank you for your tireless support, expert advice, kind patience, and financial guidance for me throughout all these years (and countries/continents!). You’ve been a wonderful advisor, and I am very grateful that our paths crossed.”

Claire

Director of Growth

“Just finished another excellent quarterly review with Michael Garcia. It’s a huge comfort knowing that my investment portfolio is being handled by a professional. Thanks for another great update and for your expert advice as always. Looking forward to the next one.”

Ian

Project Engineering Manager

“Great service level - I feel listened to but sometimes challenged - and that’s what an individual needs - who is not a specialized investor. Michael Garcia is a real partner to me. Thank you!”

Peter

Executive Vice President

“Working with Michael Garcia at Melbourne Capital Group- very competent and reliable. Can highly recommend them!”

Maria

Head of Fund Controlling, Reporting and Capital Events

“Thank you for all that you have done. Your professional outlook and honest approach was Excellent.”

Daryl

International School Teacher

“Having switched my investments to be handled by Melbourne Capital Group a few years ago, I've been very well supported and advised by Michael Garcia throughout. Besides regular reviews and calls, Michael provides objective analysis and advice which has helped the portfolio perform well even during volatile periods. Great work and many thanks!”

Aaron

General Manager

“I first discovered Melbourne Capital Group through a social media advert, so kudos to their smart targeting. I'd been searching for a money manager to help diversify my portfolio, and they connected me with Michael Garcia and Arafat Chowdhury. They made the onboarding process seamless and Michael has since guided me with sage advice and exceptional service. His responsiveness, clarity, and calm approach have given me real peace of mind and I feel like I'm on firmer financial footing. I highly recommend Melbourne Capital Group to expats across Southeast Asia who want their money to work smarter.”

Michael

Lecturer

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

Structuring your Wealth

- Optimizing Tax Efficiency
- Refinancing
- Pension Consolidation and Simplification

Protecting your Wealth

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

Goal-based Planning

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

Our Approach:

- | | |
|---|--|
| 1 | <ul style="list-style-type: none">• Quarterly service meetings• Quarterly discussion with in-house fund researcher |
| 2 | <ul style="list-style-type: none">• Quarterly fund portfolio updates• Quarterly unit statements |
| 3 | <ul style="list-style-type: none">• Personalized fund research• Personalized fund portfolio |
| 4 | <ul style="list-style-type: none">• In-house handling of any changes, e.g.<ul style="list-style-type: none">◦ 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.

Helping you achieve your financial goals.

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