



# Sam Harris

## Private Wealth Manager

Hello, I'm Sam, a Private Wealth Manager at Melbourne Capital Group.

I began my career in financial services in 2003 at one of the UK's leading financial firms. Over the past 20 plus years, I have worked with some of the UK's largest banks and building societies, gaining extensive experience across all areas of financial advice. I am a qualified Financial Planner, having achieved the Diploma in Financial Advice through the Chartered Insurance Institute.

In 2024, I expanded my services to work with expatriates overseas and joined Melbourne Capital Group. This led me to relocate to Asia, an exciting move, yet one that felt familiar, as I spent part of my childhood in Malaysia, attending The Alice Smith School. I have fond memories of the people and of course, the incredible food!

As an Independent Financial Planner, I am part of a community of professionals committed to providing holistic, impartial and unbiased financial advice. My focus is on placing clients in the best possible financial position, ensuring their long-term security and well-being.

Outside of work, I am a keen cricketer and play for the Malaysia British Cricket Club. I also enjoy windsurfing, golf and of course, the food! Maintaining my physical fitness is important to me, as it keeps my mind positive and focused, allowing me to fully concentrate on my clients' needs.

With expertise in retirement planning, investment management and estate planning, my goal is to deliver strategies that genuinely meet my clients' needs and objectives. I aim to guide them through their financial journey, providing peace of mind that they, and their loved ones, are safe and secure.



## Contact Details

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# Sam Harris

## 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:

- DipFP - Diploma in Regulated Financial Planning
- AF2 - Business Financial Planning
- RO1 - Financial Services, Regulation and Ethics
- RO2 - Investment Principles and Risk
- RO3 - Personal Taxation
- RO4 - Pensions and Retirement Planning
- RO5 - Financial Protection
- RO6 - Financial Planning Practice
- PFS – Advanced Certificate in Mortgage Advise & Practise

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



# 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