



# Suresh Raj Yogaraj

## Private Wealth Manager

I graduated with a Finance degree from the University of Hertfordshire in 2008, just as the world was facing a financial crisis. I began my career with a British Independent Financial Advisory company, serving high-net-worth expatriates based in Kuala Lumpur, Malaysia, as a Portfolio Analyst. Despite challenging market conditions and double-digit portfolio losses, I managed to double assets under management by building strong client relationships and gaining their trust. Within two years, I was entrusted with managing a client portfolio of over £50 million on a discretionary basis, consistently delivering returns across different market cycles.

In 2016, I completed a Certificate in Investment Management from the Chartered Institute for Securities & Investment (CISI) in the UK and relocated to Singapore. There, I managed assets for high-net-worth expatriate clients, gaining extensive knowledge of regulatory standards and best practices under the Monetary Authority of Singapore. This experience further solidified my credibility and trustworthiness with clients.

As the world grappled with the pandemic in 2020, I recognised the lack of financial planning among Malaysian households and businesses. I decided to pivot my focus to the domestic market, working towards my Registered Financial Planner (RFP) certification from the Malaysian Financial Planning Council (MFPC). During this time, I joined the Elite programme at AIA to deepen my understanding of the financial products available in Malaysia, eventually graduating as an AIA Elite Pro after 18 months.

To offer clients unbiased advice, I joined Blueprint Planning, which has since been acquired by Melbourne Capital Group Sdn Bhd. My journey has been driven by a desire to educate businesses and families on the importance of financial planning, and my 15 years of hands-on experience with complex investment and financial products underpin the high level of service I provide.

Outside of work, I am actively involved with the grassroots football club “Harimau Muda Klang.” Through the club, I connect with people from all walks of life while helping young players develop their football skills. The club, which trains both boys and girls aged 6 to 16, participates in local leagues, friendly matches, and holds weekly training sessions. Our goal is to foster teamwork and make football accessible to everyone in the community. With volunteer coaches and a nominal fee to cover field rental, we aim to keep kids engaged in sports.



## Contact Details

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# Suresh Raj Yogaraj

## My Qualifications and Experience



I attended the University of Hertfordshire and received BA in Finance



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

- CISI Level 4 Certificate in Investment Management
- CISI Level 4 UK Regulation & Professional Integrity
- CISI Level 4 Financial Planning and Advice



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

- PCEIA Life Insurance AC
- PCEIA General Insurance Only BO
- Certificate Examination in Investment Linked Life Insurance



I am a Registered Financial Planner and Shariah Registered Financial Planner with the Malaysian Financial Planning Council

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



# 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