



Helen Thomas

Private Wealth Manager

I am a Chartered Financial Planner, Fellow of the Personal Finance Society (PFS), and Certified Financial Planner (CFP) with the CISI, currently working as a Private Wealth Manager with Melbourne Capital Group.

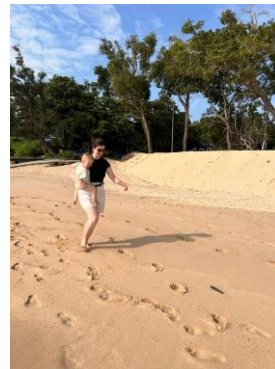
I specialise in providing bespoke financial planning and wealth management strategies for individuals, retirees, and families. My approach is rooted in holistic advice, combining technical expertise with a strong emphasis on building long-term, trusted relationships.

Before joining Melbourne Capital Group, I worked for a UK-based Independent Financial Adviser firm, where I developed extensive experience in retirement planning, wealth preservation, business succession, and estate planning.

In August 2025, my family and I relocated from the UK to Malaysia after my husband was offered an exciting opportunity to further his career in civil engineering. With a young son in tow, we felt it was the perfect time to embrace a new adventure and experience life overseas. Having worked as a Chartered Financial Planner in the UK for many years, I was eager to continue doing what I love, helping clients make confident, well-informed financial decisions. After careful research, I discovered Melbourne Capital Group, a firm that truly aligned with my professional values. Their focus on putting financial planning at the heart of everything they do, and their commitment to helping clients build and maintain strong financial positions, made them the perfect fit.

In addition to my role as a wealth manager, I am proud to serve as the President of the Insurance Institute of Liverpool for the 2025/26 year. I am also a strong advocate for financial education and previously served as an Education Champion for the PFS in the UK, delivering financial education sessions to school-aged students and championing financial literacy for the next generation.

Outside of work, I enjoy life in Malaysia with my family, mixing soft play adventures with hawker centre discoveries, beach trips, and hikes in the Johor countryside.



Contact Details

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helenthomas@melbournecapitalgroup.com

Helen Thomas

My Qualifications and Experience



I attended the University of Liverpool and received BA (Hons) Business Studies.



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

- Certified Financial Planner



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:

- Chartered Financial Planner
- Fellow of the Personal Finance Society (PFS)

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, Kaz 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

- Optimising 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

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

2

- Quarterly fund portfolio updates
- Quarterly unit statements

3

- Personalised fund research
- Personalised fund portfolio

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

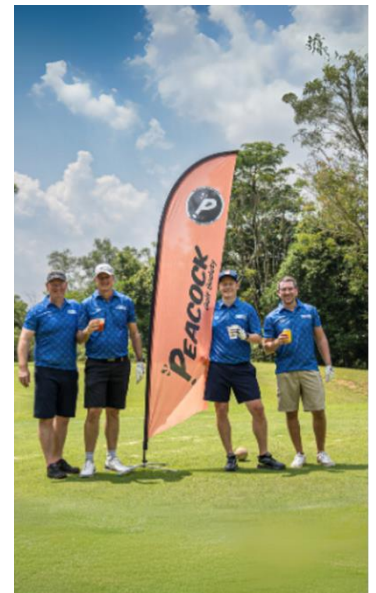
We believe wealth should be used as a tool to bring about positive change. This belief forms a central tenement of our operations and sees us support various charities and community initiatives by fundraising, donating and hosting events.

Charity Work

The Lost Food Project is an 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.

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.



Scan to view our reviews