ShawandPartners

Financial Services

Your partners in building and preserving wealth

"We are a long-established investment advisory business dedicated to managing and building our clients' wealth. We take pride in providing high-quality, personalised investment advice to clients who value strong relationships and attentive service."

Jason Watson, Head of Advice

Your partners in building and preserving wealth

35+
YEARS IN THE MAKING

$55BN
ASSETS UNDER ADVICE (NZ$)

440
STAFF NEW ZEALAND AND AUSTRALIA WIDE

220
INVESTMENT ADVISERS & FINANCIAL PLANNERS IN NEW ZEALAND AND AUSTRALIA

OFFICES

AUCKLAND
KERIKERI
CAMBRIDGE
WELLINGTON
PALMERSTON NORTH
CHRISTCHURCH
QUEENSTOWN
SYDNEY
MELBOURNE
BRISBANE
ADELAIDE
CANBERRA
PERTH
NOOSA
GOLD COAST

CORPORATE VIDEO

ShawandPartners
Financial Services

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Welcome to Shaw and Partners, a highly respected investment advisory business with over 35 years of history in helping our clients grow generational wealth. At Shaw and Partners, we focus on providing wealth management experience that our clients value and trust, blending expertise, personalised service, and long-term investment discipline.

OUR PHILOSOPHY

Our approach begins with you—the individual. We believe in working closely with every client to understand who you are, your financial goals, and how best to tailor an investment strategy for you. Each client is assigned a dedicated Shaw and Partners investment adviser who ensures complete transparency and clear communication, and is readily available to assist at every stage.

We take a prudent, long-term view on investing, derived from decades of navigating market highs and lows. We emphasise capital diversification, risk management, and keeping the investment process straightforward and easy to comprehend. We keep things simple: be prudent, be careful, and do what is right for your money.

EXPERTISE AND OFFERING

The Shaw and Partners team consists of seasoned investment professionals and fund managers with extensive knowledge of navigating investment markets. Our services include portfolio advice, asset allocation, and financial asset and manager selection, alongside timely market insights.

We develop customised portfolios aligned with your best interests, combining managed funds and direct investments to deliver reliable and solid returns.

BUILDING TRUST THROUGH EXPERIENCE

Founded in 1989 as Jarden Morgan Investment Services, the company rebranded as JMIS in 2005 and then to JMI Wealth in 2018. Throughout these transitions, our experienced directors have remained actively involved, ensuring consistent stewardship and high-quality service. Our business thrives on client referrals which are an outcome of our focus on honesty, integrity, and socially responsible investing.

On 1 July 2025, Australian-based Shaw and Partners Limited acquired a majority stake in Investment Services Group (ISG), the parent company of JMI Wealth. Following this acquisition, we decided to retire the JMI Wealth brand on 1 October 2025 and adopt the Shaw and Partners Financial Services Limited name in New Zealand.

This change reflects our enhanced access to global markets and research, through Shaw and Partners and in turn their parent company EFG International. Despite retiring the JMI Wealth name, the dedication, expertise, and client-focused approach you have come to expect will continue under the Shaw and Partners banner.

Shaw and Partners Financial Services is one of Australasia's leading investment and wealth management firms. With a growing presence across Australia and now New Zealand, and more than NZD 55 billion in assets under advice, Shaw and Partners combines the intimacy of a boutique investment firm with the resources and scale of Swiss-based private bank EFG International, which manages approximately NZD 350 billion in assets and is listed on the Swiss Stock Exchange.

This strategic partnership positions us strongly for long-term growth and enhanced client service across both countries.

WHO WE SERVE

We proudly serve a broad spectrum of clients including high net worth individuals, trustees, family offices, charitable trusts, superannuation funds, iwi, migrant investors and KiwiSaver members. Our clients value our discreet and personalised approach to growing wealth sustainably over time.

If you are seeking a trusted partner to help build long-term wealth, with a commitment to integrity and service, then we invite you to connect with us for a confidential conversation.

ShawandPartners
an EFG company

Shaw and Partners is part of EFG International, a global private banking group headquartered in Zurich.

www.efginternational.com

EFG International is a global financial group offering private banking and asset management services.

INTERNATIONAL PRESENCE

As a leading Swiss private bank, EFG International has a presence in major financial centres and growth markets. EFG International operates in over 40 locations worldwide, with a network spanning Europe, Asia Pacific, the Americas and the Middle East.

SOLID FOUNDATIONS

As one of the best-capitalised Swiss private banks, EFG International is a financial partner that offers the security and solidity needed to provide clients with effective support.

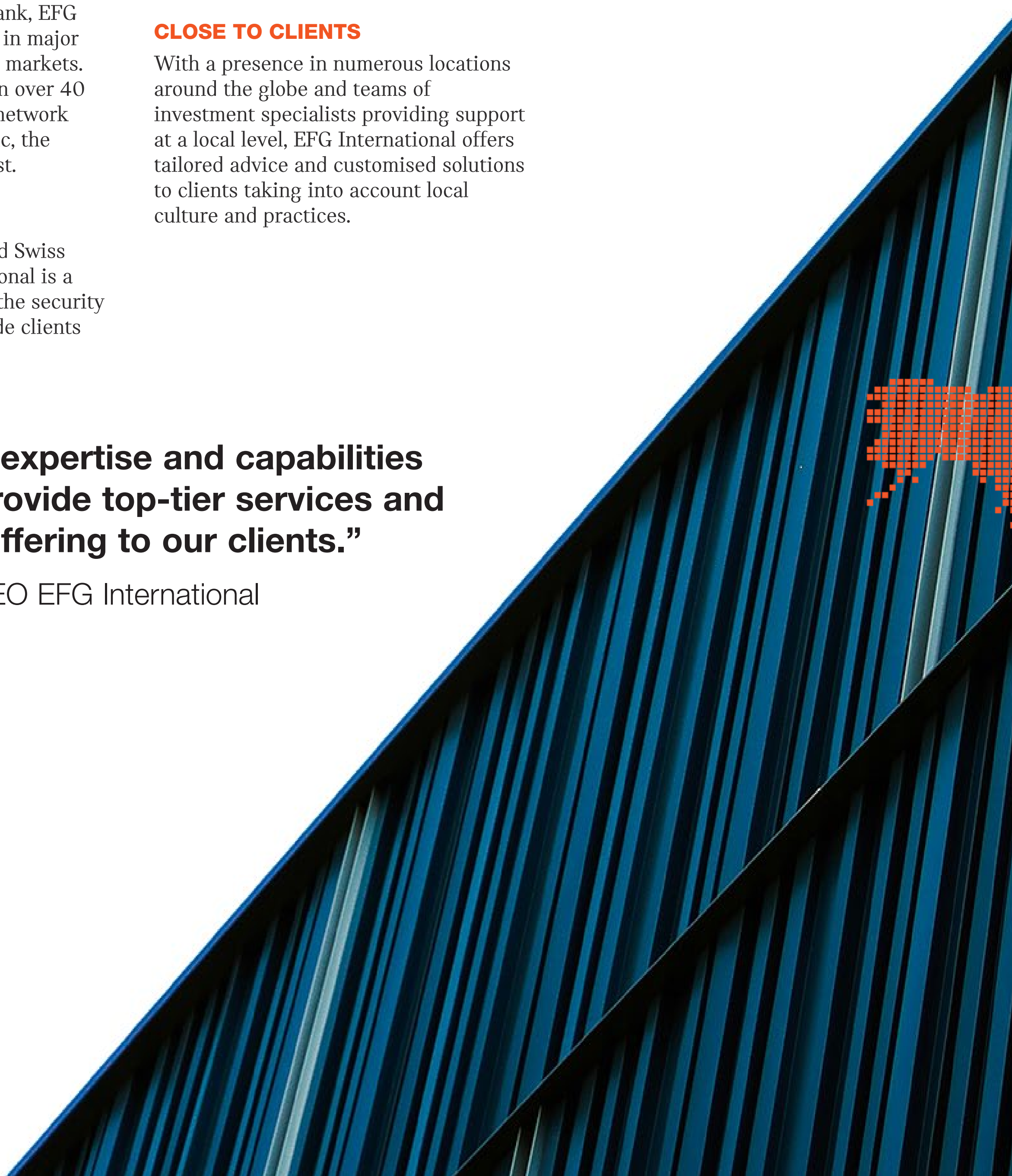
An entrepreneurial spirit has shaped the bank since it was established in 1995, enabling it to develop and offer hands-on solutions and to build long-lasting client relationships.

CLOSE TO CLIENTS

With a presence in numerous locations around the globe and teams of investment specialists providing support at a local level, EFG International offers tailored advice and customised solutions to clients taking into account local culture and practices.

“Our combined expertise and capabilities enable us to provide top-tier services and a truly global offering to our clients.”

Giorgio Pradelli, CEO EFG International



EFG combines a global focus with a strong local presence.

$350BN
ASSETS UNDER MANAGEMENT (NZ$)

700+
CLIENT RELATIONSHIP OFFICERS

A3
CREDIT RATING (MOODY'S)

3,100
EMPLOYEES WORLDWIDE

40+
OFFICES WORLDWIDE

SIX
LISTED ON THE SIX SWISS EXCHANGE

SWITZERLAND
ZURICH (HEADQUARTERS)
CHIASSO
GENEVA
GSTAAD
LAUSANNE
LOCARNO
LUGANO
ST. MORITZ

AMERICAS
BOGOTÁ
GRAND CAYMAN
LIMA
MIAMI
MONTEVIDEO
NASSAU
PANAMA CITY
PORTLAND
PUNTA DEL ESTE
RIO DE JANEIRO
SÃO PAULO

EUROPE
ATHENS
BIRMINGHAM
ISTANBUL
JERSEY
LIMASSOL
LISBON
LONDON
LUXEMBOURG
MONACO
NICOSIA
OMBERSLEY
PORTO
SHREWSBURY
VADUZ

MIDDLE EAST
BAHRAIN
DUBAI
TEL AVIV

ASIA
HONG KONG
SHANGHAI
SINGAPORE

AUSTRALIA
ADELAIDE
BRISBANE
CANBERRA
GOLD COAST
MELBOURNE
NOOSA
PERTH
SYDNEY

NEW ZEALAND
AUCKLAND
KERIKERI
CAMBRIDGE
WELLINGTON
PALMERSTON NORTH
CHRISTCHURCH
QUEENSTOWN

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Our Bespoke Wealth Advisory Approach

At Shaw and Partners, we offer truly personalised service that distinguishes us in New Zealand's investment landscape. We provide a level of service that goes well beyond simple portfolio management.

We take a holistic approach to wealth management, helping you navigate life events and investment strategies to support your broader financial goals.

ALWAYS ACCESSIBLE SUPPORT

You'll have direct access to your advisers anytime, not just during formal meetings, because financial markets don't follow schedules. We're here to provide guidance whenever you need it.

STRATEGIC PORTFOLIO REVIEWS

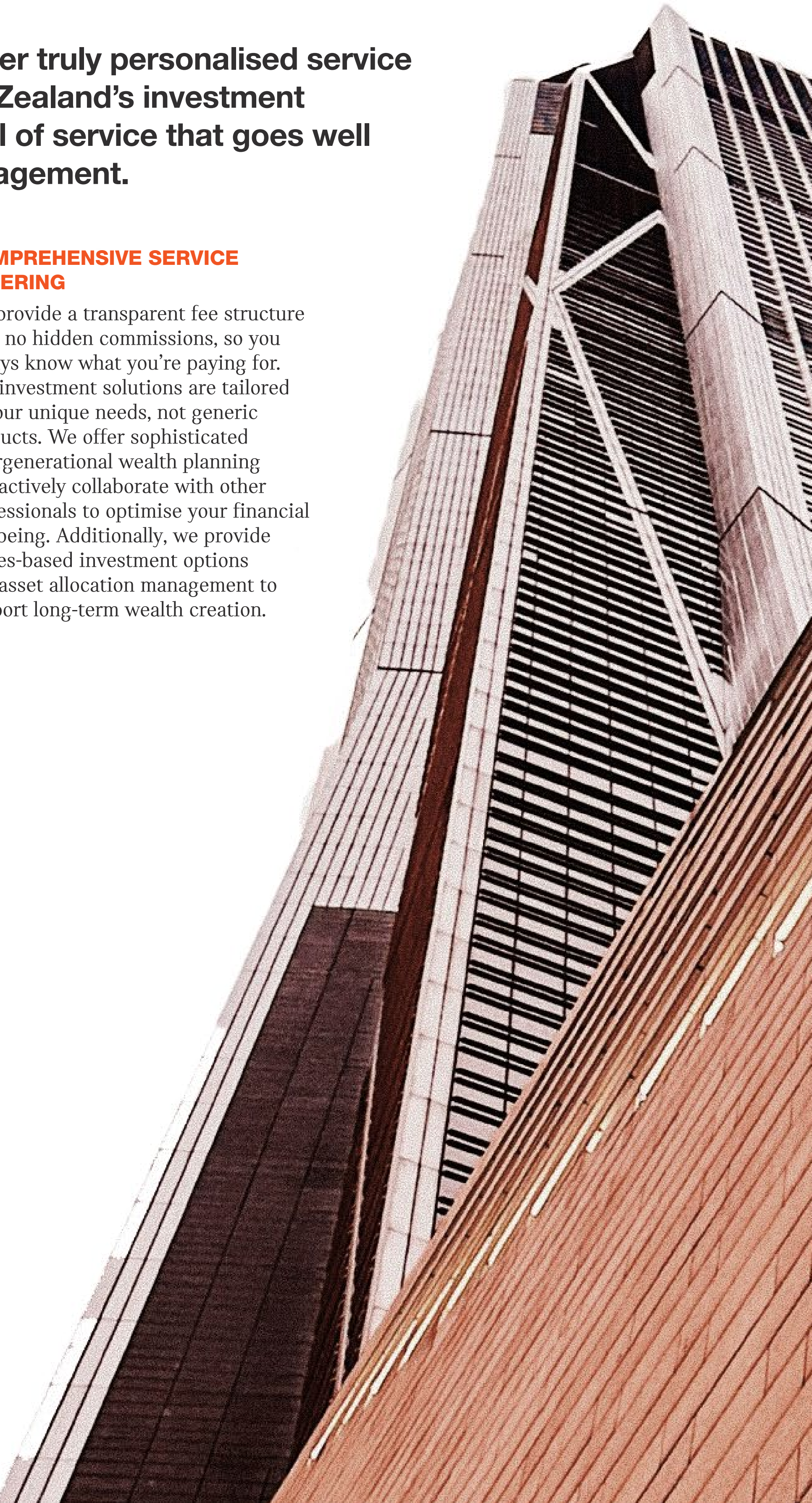
Our regular portfolio reviews provide detailed performance analysis and personalised recommendations based on your changing needs. They evaluate your progress toward goals, market impacts, and potential adjustments for an optimal strategy.

ANNUAL STRATEGIC PLANNING

Our annual sessions realign your investment strategy with your long-term risk objectives and personal circumstances. As your needs change we will identify what you require and provide a plan to optimise and enhance the growth of your wealth.

COMPREHENSIVE SERVICE OFFERING

We provide a transparent fee structure with no hidden commissions, so you always know what you're paying for. Our investment solutions are tailored to your unique needs, not generic products. We offer sophisticated intergenerational wealth planning and actively collaborate with other professionals to optimise your financial wellbeing. Additionally, we provide values-based investment options and asset allocation management to support long-term wealth creation.



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Shaw and Partners
Financial Services

Many of our clients are referred from existing clients through other business relationships.

Who We Help

Individuals
Family trusts
High net worth investors
Estates
Family offices
Migrant investors
UK pension transfers
Community trusts
Iwi
Institutions
KiwiSaver members

WECHAT

CLICK HERE

ShawandPartners
Financial Services

Investment Services

INVESTMENT MANAGEMENT SERVICE

Our Investment Management Service offers professionally managed investment strategies designed to deliver long-term returns across different risk levels.

Your advisor will work with you to select the most appropriate investment approach based on your goals and risk tolerance, then manage the portfolio on your behalf.

Ideal for:

- Individuals seeking proven investment strategies without the complexity of custom design
- Those comfortable with established investment approaches (Conservative, Balanced, Growth)

What you get:

- Access to our professionally managed investment strategies
- Direct access to your personal advisor
- An investment solution with institutional-quality management
- Market insights and investment commentary
- Quarterly performance reviews and updates.

PERSONAL ADVICE SERVICE

Completely customised investment solutions built specifically around your unique circumstances, goals, and preferences.

Every aspect is tailored to your individual requirements with ongoing strategic guidance.

Ideal for:

- Individuals with complex or specific investment requirements
- Those seeking truly personalised solutions beyond our proven investment strategies
- Experienced investors wanting bespoke investment construction

What you get:

- Completely customised investment solution designed exclusively for you
- Ongoing strategic consultations and recommendations
- Comprehensive research supporting your bespoke strategy
- Professional administration of your tailored solution
- Educational insights to enhance your investment understanding
- Full flexibility to modify your strategy as needs evolve.

Difference: Investment Management uses our proven investment strategies; Personal Advice creates a completely unique solution designed specifically for you.

WHOLESALE DISCRETION SERVICE

Our Wholesale Discretionary Investment Management Service offers sophisticated investors access to institutional-grade investment strategies typically unavailable to retail clients. Designed exclusively for wholesale investors, this service combines full discretionary management with access to alternative investments, direct securities, and wholesale-only opportunities.

Ideal for:

- Sophisticated investors who qualify as wholesale clients under regulatory guidelines
- Individuals seeking access to institutional investment opportunities with full discretionary management
- Experienced investors comfortable with higher-risk, higher-return strategies
- Those wanting professional management without the complexity of formal governance structures
- Qualified investors with $750,000 or more

What you get:

- Full discretionary management by experienced investment professionals
- Access to wholesale-only investment opportunities and alternative strategies
- Products unavailable to retail investors
- Comprehensive portfolio administration and professional execution services
- Sophisticated risk management and performance reporting
- Quarterly strategy reviews with your dedicated adviser(s)
- Dedicated investment team managing all aspects of implementation.

CONSULTING

Our Consulting Service provides comprehensive wealth strategy design for clients with complex financial needs or substantial assets requiring institutional-level oversight. Our Investment Management Team will work closely with you to develop a completely unique investment approach, including formal documentation through a bespoke Statement of Investment Policy and Objectives (SIPO).

Ideal for:

- High net worth individuals and families requiring comprehensive wealth strategies
- Institutional clients, trusts, and foundations needing formal investment governance
- Complex family structures with multiple entities or generations (e.g. Family Offices)
- Clients seeking institutional-quality investment management with personalised service

What you will get:

- Comprehensive wealth strategy design and formal investment policy documentation
- Dedicated investment team managing all aspects of implementation
- Complete investment management including custodial, execution, and monitoring functions
- Sophisticated reporting tailored to your governance requirements
- Regular strategy reviews and policy updates as circumstances evolve
- Access to institutional investment opportunities and alternative strategies.

Partnering with communities and fostering young talent

Shaw and Partners is committed to supporting and promoting emerging talent through sponsorships that help individuals and organisations thrive across New Zealand.

NEVE UPSTON UNDER 15 TENNIS

PINK RIBBON WALK

SHAW AND PARTNERS 18FT SKIFF RACE TEAM

“At Shaw and Partners, we are dedicated to delivering tailored financial solutions with a client-focused approach. Our team of experts anticipates investment opportunities and cultivates long-term relationships based on trust, while giving back to the community and supporting meaningful causes.

Together, we build and preserve wealth for a brighter future.”

Earl Evans, Shaw and Partners CEO

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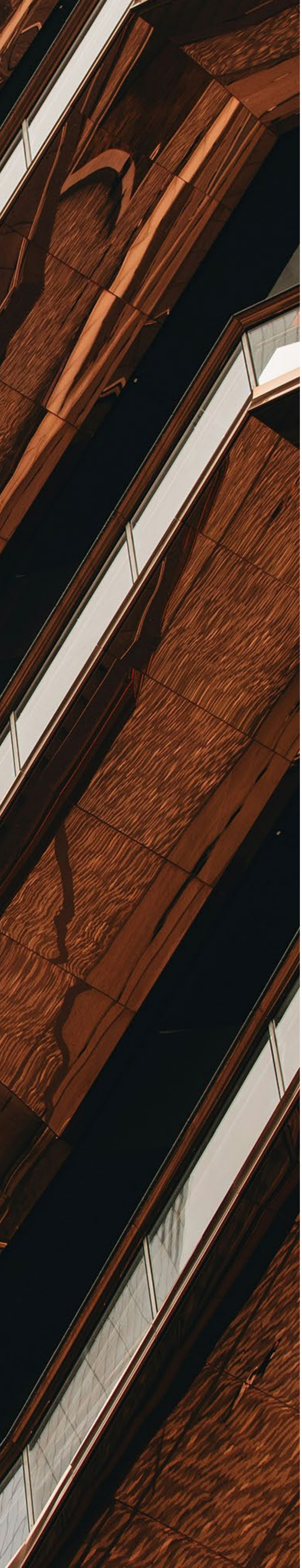

Contact us

Shaw and Partners is dedicated to offering a complete range of advisory and investment services to assist you in meeting your financial objectives.

If you would like to learn more, please contact our office to arrange an initial consultation with no obligation.

We welcome you to Shaw and Partners.
Your partners in building and preserving wealth.

HEAD OFFICE

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shawandpartners.co.nz

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SYDNEY | MELBOURNE | BRISBANE | ADELAIDE | CANBERRA

PERTH | NOOSA | GOLD COAST

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