Our Independence Maximises Yours.

Independence, in Every Sense.

At Hewison Private Wealth, independence is a mindset – woven into how we think, how we work, and how we build relationships that span generations. It's why every recommendation is tailored, every strategy aligned to your unique goals, values and vision for the future.

Approaching $3 billion under management, we've built a legacy of trust by staying true to one principle: when advice is bespoke and truly independent, it works entirely for you.

04
Our Promise

05
Our Essence

06
About You, With Us

08
Our Investment Philosophy

09
How We Invest

10
Your Suite of Services

12
Who We Work With

13
Legacy & Philanthropy

14
Our Values in Action

15
Reputation Earned, Not Claimed

17
Client Satisfaction

19
Let's Talk

The Freedom to Define Your Future.

At Hewison Private Wealth, independence isn't just how we operate—it's why we exist.

For more than 40 years, we've helped successful individuals, families, and business owners take control of their wealth—by first understanding what truly matters to them. Whether it's securing your family's future, realising a lifelong goal, or simply having the freedom to choose what comes next, our advice is designed with purpose.

Tailored, strategic, and completely aligned to your goals—we deliver clarity and confidence so you can focus on what matters most—to you, your family, and you future.

Our Independence Maximises Yours.

You've earned your success—and now you're shaping what comes next. Whether you're preserving what you've built, growing your legacy, or giving back in ways that reflect your values, we believe exceptional advice is built on trusted relationships.

We believe exceptional advice is built on trusted relationships. That's why we invest deeply in understanding the people and families we serve—not just their wealth, but their vision, values, and the impact they want to make.

Many of our relationships span decades and generations. It's a privilege we don't take lightly—and a responsibility that drives everything we do.

Advice That Aligns With You.

When you choose Hewison, you choose advice that's free from commissions, or conflicts. Everything we do—every recommendation we make—is shaped by your ambitions and values. We specialise in bespoke wealth strategies across investment management, family office services, estate planning, philanthropy, and risk protection—because no two clients are the same.

You're not here for average. Neither are we.

The Hewison Advantage.

FREEDOM THAT PUTS YOU FIRST.

As a truly independent firm, we're free from institutional agendas. No platforms. No model portfolios. Just clear, considered advice—always aligned with your best interests.

ADVICE THAT REFLECTS YOU.

Every strategy is built from the ground up—designed to reflect your goals, lifestyle, and long-term vision. No templates. Just tailored thinking, shaped entirely by you.

ACCESS THAT UNLOCKS OPPORTUNITY.

From global markets, to private equity and unique property opportunities—you gain access to investments that align performance with purpose.

BUILT FOR GENERATIONS.

We help you plan beyond the present—crafting strategies that preserve your wealth, protect your values, and support family harmony across generations. Because true legacy isn't just what you leave behind, it's what you set in motion.

SERVICE THAT SETS THE STANDARD.

Discreet. Seamless. Five-star by design. A dedicated team that anticipates your needs and delivers with clarity, care, and precision.

Control. Clarity. Confidence.

Refined over four decades, our investment philosophy has consistently guided clients through complexity, volatility, and opportunity. We believe in majority direct ownership because it gives you full transparency, meaningful control, and the ability to act with intention.

Our approach is patient and disciplined. Conservative when markets demand caution, decisive when opportunities arise. Every portfolio is tailored to your objectives—not just to perform, but to preserve what matters. Through strategic asset allocation, regular rebalancing, and deep alignment with your long-term goals, we help grow and protect your wealth.

Every Journey Is Unique. So Is Our Advice.

We take a direct, disciplined approach to portfolio design—delivering Individually Managed Accounts (IMAs) tailored to your goals, actively managed with insight and care.

Investment opportunities are sourced through our long-standing market relationships and rigorously reviewed and endorsed by our Investment Committee, which brings over 70 years of combined experience to every decision. By avoiding pooled structures and restrictive platforms, we ensure complete transparency, control, and flexibility. Portfolios are regularly rebalanced, with strategic asset allocation and dynamic adjustments as markets—and your circumstances—evolve.

Everything is administered in-house and accessible 24/7 via our secure private client portal, offering real-time insight into performance, asset allocation, and cashflow. We offer tailored investment and asset management services across all major asset classes including:

EQUITIES

We invest in high-quality Australian and global companies, using direct ownership and best-of-breed managers where appropriate. Our focus is long-term value—maximising total return through capital growth and growing dividends, supported by active portfolio management and broad diversification.

PROPERTY

Through our network of specialist property managers and family office partnerships, we access direct syndicated opportunities across the commercial, industrial, hospitality and retail sectors. We prioritise high-quality assets, experienced operators, consistent cashflow, and long-term growth potential.

PRIVATE MARKETS & ALTERNATIVES

With over 30 years' experience in private markets, our capabilities span debt and equity investments in unlisted companies, growth capital, buyouts, and venture capital—from early to late-stage. These opportunities strengthen portfolio diversification and provide access to sectors beyond traditional markets.

FIXED INTEREST

Our fixed interest strategies include real estate–secured first mortgages, private credit, and bonds. These are designed to deliver income and capital stability, with a strong emphasis on downside protection. Every investment undergoes rigorous due diligence and Investment Committee approval.

CASH

Our cash management solutions are integrated into your overall portfolio strategy—balancing income generation with liquidity needs for withdrawals, expenses, and investment opportunities.

Built Around You. Delivered With Precision.

We deliver a complete suite of bespoke services under one roof—including strategic advice, investment management, portfolio administration, and brokerage—all managed in-house. Our aim is to reduce complexity and relieve the administrative burden on you, streamlining your experience and removing unnecessary layers of fees—so your wealth is managed with clarity, confidence, and complete control.

- Financial Advisory Services
- Family Office
- Investment Advice
- SMSF Management
- Intergenerational Wealth
- Estate Planning
- Strategic Philanthropy
- Risk Management & Insurance

Our role goes well beyond technical execution. We're here to build long term relationships defined by trust, independence, and a deep understanding of what matters most to you.

We also work in partnership with your accounting and legal advisers—ensuring your tax, estate, and broader financial strategies are cohesive, compliant, and fully aligned.

Our Commitment to Security & Transparency.

Safeguarding your wealth is just as important as growing it. Our investment and reporting frameworks prioritise control, transparency, and best-practice governance.

- Individually managed accounts ensure continuous legal ownership of your assets.
- Daily reconciled private client portal provides full transparency and access, anytime.
- Robust compliance and governance protocols meet the highest financial, legal, and ethical standards.
- Our digital infrastructure meets leading cybersecurity standards, with multi-factor authentication, encryption, and 24/7 system monitoring in place.

Partners in Your Progress.

We support and work with successful individual and established families who value clarity, control and meaningful outcomes. Our clients include:

- Established and multi-generational families.
- Entrepreneurs, professionals, and business owners.
- Individuals navigating change or major liquidity events.
- Charities and private foundations.

These relationships often span decades – and generations. Whether you're building wealth, preserving it, or preparing to pass it on, we provide advice that reflects your ambitions, not someone else's agenda. If you value independence and clarity over compromise, we understand exactly what you mean.

Freedom is Also the Power to Give Back.

True legacy isn't just about what you pass on—it's about what you stand for. We help you structure philanthropy, mentor the next generation, and align your giving with what matters most to you – and endures well beyond your lifetime.

Through the Hewison Foundation, we extend this commitment to the broader community, creating opportunities for meaningful change through our own philanthropic fund and program of giving.

More Than a Team.
A Culture of Excellence.

At Hewison, our values are lived, not laminated. Our culture is shaped by four simple values that define how we show up for each other and you. They shape every interaction, guide every decision, and underpin every result.

EXCELLENCE

We care deeply about every aspect of what we do. We don't settle or take shortcuts—every action, recommendation, and interaction reflects our high standards. We remain curious, always learning and growing in the pursuit of being the best for our clients and for each other.

EMPOWERMENT

We are trusted to act with initiative and encouraged to challenge the status quo. Whether it's anticipating a client's unspoken needs or innovating to improve a process, we take responsibility for outcomes and hold ourselves accountable to deliver an experience that exceeds expectations.

FAMILY

We care with intention. We respect the individuality of every client and colleague and see people not just for where they are—but for what they hope for, dream of, and aspire to. Our feedback is honest, constructive and always shared in the spirit of growth. Relationships are at the heart of everything we do.

FUN

We bring positivity, presence, and authenticity to work every day. We're professional, yet relaxed. We support one another, stay connected, and make space to laugh and celebrate the wins—because when we enjoy what we do, it elevates the experience for everyone.

Trust Built Over Time.
Stories That Prove It.

You don’t have to take our word for it. Speak with those who’ve trusted us for decades—and hear how the right advice changed everything. We invite you to speak with those who’ve trusted us through generations. Their stories say more than we ever could.

"Hewison Private Wealth have been managing our investments for the past 3½ years and we are pleased with our decision to engage the Hewison team. Our Advisors are a pleasure to deal with and we have confidence in their ability to assist us in achieving our wealth creation goals."

— Simon Cox

"The service provided by Hewison Private Wealth has been outstanding - reassurance and advice has been an easy phone call away at any time."

— John Gough, long-term client

"The team at Hewison have become trusted stewards of our family's wealth and vision. Their approach is utterly bespoke, their discretion unparalleled."

— Long-standing Family Office Client

Excellence, Measured and Delivered:

9 / 10

Client satisfaction score

92%

RATED US 8-10

66

NPS
(above industry average of 50)

What Clients Say We Do Best.

PEOPLE

9.5 / 10

Praised for clarity, confidence, and guidance.

PROCESS

9.6 / 10

Highly rated for responsiveness and transparency.

SOLUTIONS

9.5 / 10

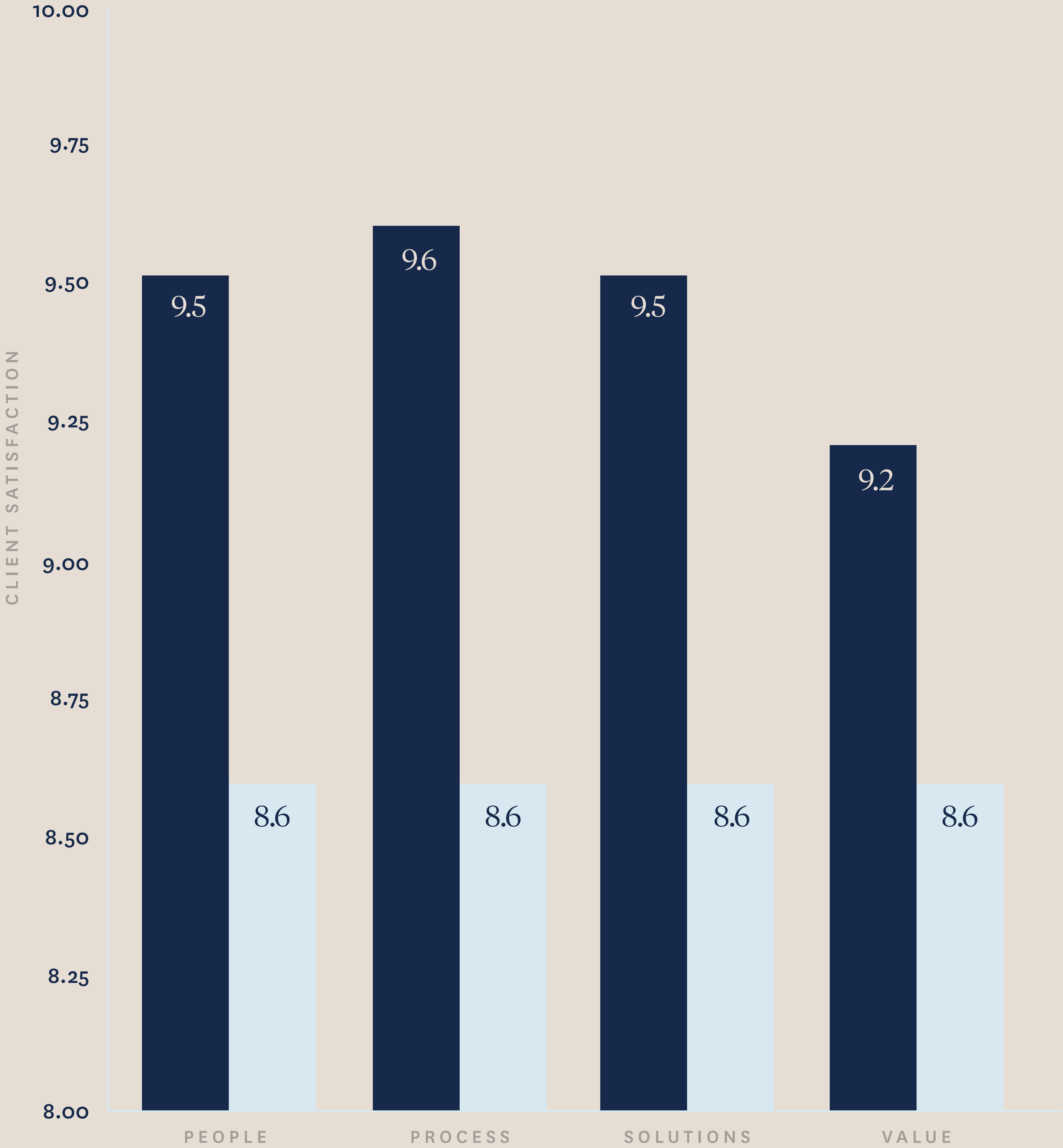
Known for breadth and personalisation.

VALUE

9.2 / 10

Exceeding expectations for insight and expertise.

Client Satisfaction vs. Industry Benchmark



Source: KPMG 2023, Macquarie VAN Network Propensity Survey.

Start With Trust. Continue with Confidence.

Choosing an Adviser is about more than strategy—it's about trust, shared values, and a relationship that grows with you. That's why our first conversation is always personal, confidential, and centred on what matters most to you.

Whether you're navigating change, building your legacy, or simply seeking advice without agenda, we're here to listen—and guide with purpose.

Because when your advice is truly independent, you move forward with clarity and confidence.

CONTACT

(03) 8548 4800
info@hewison.com.au

ADDRESS

Level 8, 417 St Kilda Road,
Melbourne VIC. 3004 Australia.

WEBSITE

hewison.com.au

HEWISON
PRIVATE WEALTH