

THE AUSTRALIAN

WEALTH > CAPITAL GAINS

Barron's list of top financial advisers crowns Mathew Cassidy as 2025 top adviser

A new king has been crowned in Australia's financial advice sector as the prestigious Barron's Top 150 list reveals dramatic shifts at the industry's summit | [FULL LIST](#)

By [JAMES KIRBY](#)



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There are big changes at the top of the financial advice industry and it's reflected in this year's Barron's Top 150 Financial Advisers list, which has produced a new number one for the first time since 2020.

Garth Hu, the Morgan Stanley Wealth Management adviser who topped the list for five years in a row, has made way for [Mathew Cassidy of the Partners Wealth Group](#).

In fact, Hu and his long-time Morgan Stanley colleague Cathy Ding are not on this year's list because they are setting up a new independent wealth advisory operation.

The absence of Ding from this year's list also created a vacancy for the top female adviser spot, which this year goes to Bernie Connolly from Morgan Stanley Wealth Management.

When we launched about 10 per cent of advisers on the list were women; this year it's 14 per cent.

The marginal improvement comes as the old perception of female investors is being upended with the [number of high-net-worth women in Australia growing at double the pace of men](#).

That trend runs alongside a couple of others such as the intergenerational wealth transfer and how for [younger generations it's cool to talk about money openly](#).

A shrinking pool of advisers is [increasingly focusing on high-net-worth individuals](#) as they struggle to serve “mum and dad” clients.

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Barron's List 2025



**Wholesale adviser, not required to be registered with ASIC*

Filters ▼

1. Mathew Cassidy

Partners Wealth Group



2. Andrew Dunbar

Apt Wealth Partners

**3. Scott Carmichael**

Escala Partners

**4. Paul Burgon**

Lipman Burgon & Partners

**5. Robert Hand**

Partners Wealth Group

**6. Campbell Vidgen**

Macquarie Private Bank

**7. Charlie Viola**

Viola Private Wealth

**8. Benjamin Kohn**

Focus Partners Australia | Link Financial Services



9. Andrew Cowen

Macquarie Private Bank

**10. Frank Macindoe ***

Koda Capital

**11. Matthew Donat**

Koda Capital

**12. David Bedford**

Pitcher Partners

**13. Chris Smith**

VISIS Private Wealth

**14. Adam Stanley**

Pitcher Partners

**15. Daniel Tome**

Perpetual Private



16. Chad Brendish

Morgan Stanley Wealth Management

**17. Ben James**

Escala Partners

**18. Tim Eustace**

Mercury Private

**19. Ben Forrester**

Macquarie Private Bank

**20. Bernie (Bernadette) Connolly**

Morgan Stanley Wealth Management

**20. Patrick Regan**

Morgan Stanley Wealth Management

**21. Jamie Cockerill**

Perpetual Private



22. Matthew Smith

Altus Financial

**23. Phillip Gillard**

Shadforth Financial Group

**24. Kellie Davidson**

Pitcher Partners

**25. Scott Girdlestone**

William Buck Wealth Advisors

**26. Ashley Davis**

Shadforth Financial Group

**27. Troy Theobald**

RFS Advice

**28. Adam Montana**

Altus Financial



29. Anita Beckers

Macquarie Private Bank

**29. Matthew Gartrell**

Macquarie Private Bank

**30. Jarrod Broadbent**

BlueRock

**31. Dave Haydon**

Haydon Partners

**32. James McGregor**

Apt Wealth Partners

**33. Gregory Mifsud**

Altus Financial

**34. Andrew Rochester**

Morgan Stanley Wealth Management



35. Sean Abbott

Koda Capital

**36. Nick Batrouney**

Morgan Stanley Wealth Management

**37. Brad Wira**

Shadforth Financial Group

**38. Paul Nicol**

GFM Wealth Advisory

**39. Matt Koch ***

Morgan Stanley Wealth Management

**40. Arjang Taylor**

Morgan Stanley Wealth Management

**41. Paul Lyons**

Morgan Stanley Wealth Management



42. Andrew Barlow

William Buck Wealth Advisors

**43. Will Hamilton ***

Hamilton Wealth Partners

**44. Ben Andreou ***

Koda Capital

**45. Hugh Robertson**

Centaur Financial Services

**46. Peter Seldon**

Morgan Stanley Wealth Management

**47. Sally Huynh**

Shadforth Financial Group

**48. David Clark**

Koda Capital



49. Laurence Poulter

Partners Wealth Group

**50. Philip Davison**

Shadforth Financial Group

**51. Stephen Shostak**

Macquarie Private Bank

**52. Amanda Fong**

Escala Partners

**53. Andrew Bollen**

Shadforth Financial Group

**54. Patrick Barry**

Partners Wealth Group

**55. Andrew Harrison**

Shadforth Financial Group



56. Laurel Moulynnox

Morrows Private Wealth

**57. Michael Ogg ***

Providence Wealth Advisory Group

**58. Paul Ashworth**

Cameron Harrison Private

**59. Stephen Jones**

Smith Coffey

**60. David Simon**

Integral Private Wealth

**61. Clint Beeck**

Shadforth Financial Group

**62. Marshall Brentnall**

Evaesco Financial Services



63. Richard Felice

Belay Advisory

**64. David Lipari**

ANZ Private

**65. Craig Raits**

Shadforth Financial Group

**66. Andrew Hudson**

Morgan Stanley Wealth Management

**66. Scarlet Fung**

Morgan Stanley Wealth Management

**67. Simon Growden**

Shadforth Financial Group

**68. Steven Grenda**

Shadforth Financial Group



69. Andrew McCracken

Shadforth Financial Group

**70. Belinda von Knoll**

Shadforth Financial Group

**71. Travis Pitt ***

Escala Partners

**72. Charlie Fraser**

Shadforth Financial Group

**73. Mark Vignaroli**

Perpetual Private

**74. Andrew Pidgeon**

Shadforth Financial Group

**75. Craig Tonkes**

Koda Capital



76. Ed Brooke

Escala Partners

**77. Neil Kendall**

Tupicoffs, The Independent Financial Planners

**78. Chris Murphy**

Boston Private Wealth

**79. Olivia Maragna**

Aspire Retire

**80. Simon Mills ***

Morgan Stanley Wealth Management

**81. Simon Duckett**

Koda Capital

**82. Nicholas Carlton ***

Morgan Stanley Wealth Management



83. Mark Bradley

Morgan Stanley Wealth Management

**84. Mark Pollasky**

Koda Capital

**85. Richard Cooper**

Wilsons Advisory

**86. Charles Moore**

Koda Capital

**86. Peter Dunn**

Koda Capital

**87. Glenn Fairbairn**

Hewison Private Wealth

**88. Matthew Owen**

Macquarie Private Bank



89. Stuart Beattie

Shaw and Partners

**90. James Wortley**

Enlightened Financial Solutions

**91. Les McGuire**

Future Proof Wealth

**92. Kate Golder**

Alteris Financial Group

**93. Liz Wheatley**

Perpetual Private

**94. Joel Fuller**

ANZ Private

**95. Paul Begley**

Koda Capital



96. Campbell Sorell

Shadforth Financial Group

**97. Joshua Blythe**

Shadforth Financial Group

**98. Peggy (Bi-Chun) Liang**

Stewart Brown Advisory

**99. Harriet Gibb**

Shadforth Financial Group

**100. Nathan Lear**

Hewison Private Wealth

**101. Sam Stillone**

Esencia Wealth

**102. Farren Williams**

Koda Capital



103. Jordan Kennedy

Pitcher Partners

**104. Andrew Brunero**

Shadforth Financial Group

**105. Kevin Centra**

Shadforth Financial Group

**106. Brett Ulrick**

Elston

**107. Hamish Harvey**

Stanford Brown Private Wealth

**108. Paul Pellegrino**

Partners in Planning

**109. Tony Sarai**

Modoras



110. Jared Hoddinott

Morgan Stanley Wealth Management

**111. Peter Leggett**

Arrow Private Wealth

**112. Brendan Peacock**

Pitcher Partners

**113. Chris Morcom**

Hewison Private Wealth

**114. Martin Becker ***

Fairbridge Wealth Management

**115. Trent Doughty ***

Kelly+Partners Private Wealth

**116. Finn Dorney**

Shadforth Financial Group



117. Michael Dwyer

Shadforth Financial Group

**118. Kathryn Humphreys**

Shadforth Financial Group

**119. Edward Fletcher**

Pitcher Partners

**120. Stuart Graham**

Shadforth Financial Group

**121. Campbell Breheny**

Shadforth Financial Group

**122. Patrick Malcolm**

GFM Wealth Advisory

**123. Lynda McKie**

Elston



124. Katrina Pulbrook

RJS Wealth Management

**125. Joseph Smith**

Macquarie Private Bank

**126. Simon Curtain**

Hewison Private Wealth

**127. Steven de Natris**

Perpetual Private

**128. Martin Fowler**

Pitcher Partners

**129. Katerina Sousalis**

Modoras

**130. Michael Smith**

Macquarie Private Bank



131. David Meffert

Discover Financial Partners

**132. Todd Stanford**

Stanford Brown Private Wealth

**133. Juliana Rajkovic**

Escala Partners

**134. David Burgess**

Morgan Stanley Wealth Management

**134. Sam Saunders**

Morgan Stanley Wealth Management

**135. Antony Green**

Morgan Stanley Wealth Management

**136. Simon Wotherspoon**

Perks Private Wealth



137. Travis Schindler

Hewison Private Wealth

**138. Alex O'Brien**

Alteris Financial Group

**139. Anthony Castellaro**

Elston

**140. Ben Woolvett**

Signate Private Wealth

**141. Susan Buda**

Focus Partners Australia

**142. Jonathan Kilborn**

Cardena Private Wealth

**143. Mark Spencer**

Shadforth Financial Group



144. Will Kenny

Canaccord Genuity

**145. Peta Nunn**

Perks Private Wealth

**146. Ryan Loehr ***

Emanuel Whybourne & Loehr

**147. Richard McClelland**

Perpetual Private

**148. Angus Rodgers**

PrimeWealth

**149. Andrew Wilson**

Pitcher Partners

**150. Jacqueline Kirkwood**

Shadforth Financial Group



Created by Barron's and first published in The Australian in 2017, the list is a window into a profession.

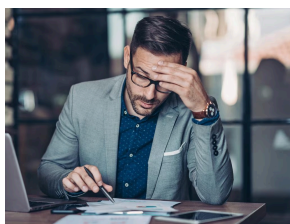


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**JAMES KIRBY** ASSOCIATE EDITOR - WEALTH

James Kirby, Associate Editor-Wealth, is one of Australia's most experienced financial journalists. James hosts The Australian's twice-weekly Money Puzzle podcast. He is a regular commentator on radio and television, the author of several business biographies and has served on the Walkley Awards Advisory Board. He was a co-founder and managing editor at Business Spectator and Eureka Report and has previously worked at the Australian Financial Review and the South China Morning Post. Since January 2025 James is a director of Ecstra, the financial literacy foundation.

X @kirby_journo
