Pitcher Partners

Capability statement

2025

Pitcher Partners Investment Services Pty Ltd

Investment services

pitcher.com.au

Pitcher Partners Investment Services Pty Ltd
ACN 052 941 036 ABN 24 052 941 036 AFSL 229887

Who we *are*

Truly independent advisors

Pitcher Partners Investment Services is an investment advisory practice with a strong reputation for providing genuinely independent advice as part of a robust and coherent investment philosophy.

There are very few investment advisors that can genuinely claim independence. We believe clients deserve the best advice possible, free from the conflict of interest that may arise with product providers.

Pitcher Partners Investment Services clients receive advice that is independently researched, provides a wide choice of investment options and is fee only with no commissions. We can and do make recommendations to you based only on what is in your best interests.

We are proud to be fully independent.

Our *services*

Portfolio management

Our Portfolio Management Service is a fully integrated advice, monitoring and administration service for an investment portfolio that flexibly takes into account each client's individual needs and objectives while remaining rigorous in the approach to research and investments.

Why work with *us*

Pitcher Partners is different – we offer a professional and dedicated investment advisory service designed purely to meet our clients' needs and investment goals.

Our investment philosophy and dedicated focus is to assist clients maximise their wealth by paying attention to three important principles:

- **Optimising returns** – through appropriate strategic asset allocation, rigorous security and manager selection and not missing both opportunities and risks;
- **Minimising risk** – through capital protection and loss limitation, by an emphasis on diversification of assets as well as diversification of research and finally through active and real time market monitoring; and
- **Minimising fees and taxes** – through a combination of tax-effective structuring, 'wholesale' investing, 'direct' investing in securities wherever possible, minimising investment fees and through a high level of tax awareness such as imputation credits, tax deferred income, realisation of capital gains and the benefits of long term 'buy and hold' strategies.

How we can *help*

We have a broad range of capabilities, carefully refined over years of listening to clients across all sectors. We are trusted advisors that identify real opportunities for our clients; understanding their unique story, appreciating their vision, challenging their thinking and helping build their plan.

No matter where you are in your journey, *we can help*.

Our *clients*

Private companies and discretionary trusts	**Individuals and family groups**	**Institutions**	**Charitable trusts**
Estates	**Government**	**Not-for-profit organisations**	**Superannuation funds**

Communication is *key*

We'll keep you up to date with quarterly portfolio reports, including performance (benchmarked to market returns), asset allocation, income and expenses. You can check in on your portfolio via our online portal too. We're committed to regular and transparent communication. You can reach out to your advisor any time, and we schedule regular catch ups to keep you on top of things, review your investment strategy, and identify any opportunities as the market evolves.

Keeping fees *simple*

Our fees are simple too. We'll charge you on a quarterly basis in arrears, based on the size as asset based fee of your portfolio (excluding cash). And our services are non-discretionary – you approve every investment and can revoke our services at any time. Because our aim is to provide easy to understand and comprehensive investment advice, so that you feel confident and comfortable with your portfolio.

Advice grounded in *expert research*

Our independent research team regularly monitors a range of economic data to help give you up-to-date, proactive investment advice.

All investments are approved by our Investment Committee only after satisfying a rigorous quantitative and qualitative analysis. Investments are then monitored regularly for performance, changes to management, changes to outlook and other important factors.

Helping you invest *responsibly*

PPIS is a member of the Responsible Investment Association of Australasia (RIAA), a leading organisation that promotes responsible investment and training for financial services firms. And we are proud to say we are a member – one of the first financial advisory groups to achieve certification.

Many of our Melbourne advisors have already achieved individual certification from RIAA, which means they have the training, knowledge, and experience to give tailored advice in responsible investing.

PPIS has also developed a Responsible Investment Charter outlining the processes and procedures when offering responsible investment advice.

PITCHER PARTNERS

Making business *personal*

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Pitcher Partners Investment Services holds an Australian Financial Services Licence (No. 229887).

We are a Professional Practice of the Financial Planning Association and all of our advisors are Certified Financial Planners™. Our advisors are experienced in financial markets and hold relevant industry qualifications specialising in applied finance and investment.

Our in-house research team of five specialists brings deep market knowledge and the highest level of technical and analytical skill to bear in selecting and monitoring investments.

Our advisers and research team are supported by a compliance, systems administration and banking teams that bring the highest level of checks and balances to the management of your portfolios to help ensure their safety and security.

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