Pitcher Partners

Capability statement

2026

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 *clients*

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

Our *services*

Portfolio management

Our Portfolio Management Service is designed to help you build, manage and protect your wealth with confidence.

We develop a tailored investment strategy based on your objectives, risk tolerance and financial circumstances, then actively monitor your portfolio to ensure it remains aligned with your goals. Supported by our independent research team, we provide proactive advice, ongoing portfolio recommendations and access to investment opportunities as they arise. You'll receive regular reviews, clear reporting and unlimited access to your advisory team, giving you the confidence that your portfolio is being actively managed while remaining in your control.

Cash management

Cash is an important part of many portfolios, whether it provides liquidity, funds future opportunities or offers peace of mind during periods of uncertainty.

Our Active Cash Management service helps ensure your cash remains an actively managed part of your overall wealth strategy. We assist with cash and term deposit solutions, helping balance liquidity, security and return based on your individual circumstances.

By managing the administration and monitoring opportunities across a range of banking providers, we simplify the process and help your cash continue to work effectively, while providing access to competitive rates.

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 actively considering new opportunities;
- **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*.

Communication is *key*

We believe informed clients make better decisions. We provide receive regular advice, quarterly reporting and online access to your portfolio, so you will always know how your investments are tracking. Your advisor will proactively keep you informed of market developments, investment opportunities and any recommendations relevant to your circumstances. Most importantly, we're always available when you need us. Whether it's a question, a life event, or a change in your objectives, we're here to help you make confident and informed decisions.

Keeping fees *simple*

We believe fees should be simple, transparent and aligned with the value we provide. Our fee is based on the size of your invested portfolio and is charged quarterly in arrears. As a genuinely independent adviser, we do not receive commissions, rebates or any product-related payments from investment providers. This means our advice is focused solely on what's in your best interests. Our service is also non-discretionary, meaning you remain in control and approve every investment decision before we act. For further information about our fees, please refer to our Financial Services Guide, available on request or on our website.

Advice grounded in *expert research*

Our independent research team comprises highly experienced professionals with deep expertise across all asset classes and investment types.

We consistently monitor a comprehensive range of economic and financial market indicators to provide you with timely, forward-looking investment insights.

Every investment opportunity undergoes a robust quantitative and qualitative assessment, ensuring only the most thoroughly vetted ideas advance. Final investment approval is granted solely by our Investment Committee after meeting stringent standards. Post-approval, investments are proactively monitored for performance, evolving market conditions, management changes, and other factors critical to protecting your interests.

Helping you invest *responsibly*

We are committed to accountable advice, which is why we have a Responsible Investment Charter outlining our processes and procedures when offering responsible investment advice. Our commitment is reinforced through being certified by the Responsible Investment Association Australasia (RIAA). RIAA is a leading organisation that promotes responsible investment and training for financial services firms. Most of our advisors have also achieved individual certification from RIAA, which means they have the training, knowledge, and experience to give tailored advice that supports you in responsible investing.

Pitcher Partners

Making business *personal*

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