MEDIA RELEASE

Release Date: Monday 2nd September 2024

SHERLOCK WEALTH ANNOUNCES NEW CEO!

Sherlock Wealth is pleased to announce that Andrew Sherlock has been appointed as our new CEO.

On 1st October this year, Andrew will be taking over from Jacqui Sherlock, who has decided to step down after an eight-year tenure in the role.

One of the longest running privately owned financial planning firms in Australia, the Sydney-based business was established in 1970 by Andrew’s father, Reg Sherlock.

Now in its second generation of family ownership, Sherlock Wealth has significantly evolved its offering to serve the increasing needs of wealthy Australians looking for sophisticated lifestyle and legacy outcomes through holistic, complex and quality financial planning.

From its new harbour view suite in North Sydney, the firm provides a family office approach for its long term and multi-generational client base of senior executives, professionals, business owners and self-funded retirees.

The announcement marks an exciting new era for the company!

“I am looking forward to spearheading the next stage of transformation as we continue to scale the business to serve the growing needs of successful families,” Andrew said.

“Our clients and our team are at the centre of every decision we make. I will still have full oversight across our financial advice and service offering while increasing my involvement in driving innovation and strategic direction,” he said.

A Chartered Accountant with a background in funds management, Andrew has had an impressive 30 plus year career in financial services. A Certified Investment Management Analyst (CIMA), an SMSF Specialist Adviser and a lifetime member of the MDRT Top of the Table, he brings to the role a wealth of industry and professional experience.

This, together with his honesty and trusted integrity that is so highly valued by the firm's clients, makes Andrew well placed to be the next CEO.

In paying tribute to his wife and business partner, Jacqui, who plans to remain involved as an owner and board member, Andrew said, "Jacqui's strategic strength, leadership style, creativity, hard work and dedication to our team, are key to the strong position we're in today.

"Our excellent management team, as well as our client advice and service experts, make us well placed for this next chapter," he said.

"We are feeling really positive about the future and are looking forward to sharing some more exciting announcements in the coming weeks and months," Andrew said.

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Andrew Sherlock BIO

Andrew Sherlock is the Owner & Head of Advice at Sherlock Wealth, a Sydney based financial planning firm that has been helping successful families, senior executives, professionals, business owners and self-funded retirees with their wealth protection and creation needs and for more than 50 years.

A Chartered Accountant with a background in funds management, Andrew's career spans more than 30 years in the financial services industry. He was one of the first people in Australia to obtain the Self-Managed Superannuation Specialist accreditation; is one of only a few advisers in Australia to be a Certified Investment Management Analyst (CIMA); is a lifetime member of MDRT Top of the Table and was the first non-employee to open a hub24 account! Andrew also holds a BA Economics degree from Macquarie University with a double major in accounting and finance.

Specialising in creating excellent lifestyle outcomes for wealthy Australians looking for holistic and quality financial planning, Sherlock Wealth provides a sophisticated, family office approach for its long term and multi-generational client base.

Andrew has featured in publications such as Forbes Magazine and The Australian, in podcasts and on television. He is often asked to present at seminars and conferences and has recently been nominated for some industry awards.

To find out more about Andrew Sherlock:

LinkedIn

www.sherlockwealth.com

Jacqui Sherlock BIO

Jacqui Sherlock is the Owner and CEO of Sherlock Wealth, a Sydney-based financial planning firm that has been helping successful families, senior executives, professionals, business owners and self-funded retirees with their wealth protection and creation needs and for more than 50 years.

Prior to joining Sherlock Wealth in 2014, Jacqui's career spanned public relations, communications and marketing roles for both agency and in-house. Jacqui holds first-class honours in the Bachelor of Arts Communications degree from the University of Technology Sydney and a Cert IV in workplace training and assessment.

Her background in public relations, marketing and training allows Jacqui to bring a fresh approach to the world of financial services. This, together with her ability to connect with people and her strength in strategic thinking has allowed Jacqui to lead the company through some challenging times including COVID and the Banking Royal Commission.

Since stepping into the role of CEO in 2017, Jacqui has focused on evolving the business to achieve its long-term growth goals. She is passionate about encouraging all women to engage with their personal finances and an advocate for women in the financial advice industry.

Jacqui has featured on podcasts and in publications such as Forbes Magazine and The Australian. She has also presented at some industry seminars and conferences.

To find out more about Jacqui Sherlock:

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