MEDIA RELEASE

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SHERLOCK WEALTH ANNOUNCES SELF LICENCE

Sherlock Wealth has announced it is operating under its own licence as an authorised representative of Sherlock Wealth Advisory Services Pty Ltd (AFSL 558532).

For more than 20 years the company has been an authorised representative of Matrix Planning Solutions Pty Ltd.

The announcement comes just days after Andrew Sherlock took over as CEO.

“This is an exciting next step in the evolution of our business,” said Sherlock Wealth CEO, Andrew Sherlock.

“Operating under our own licence has been something we have always wanted to do. For us it’s always been a question of when not if.”

“The timing is right for us. This will give us greater flexibility in delivering advice and investing opportunities to our clients. It feels good to be more in control of our own destiny,” he said.

Based in North Sydney, Sherlock Wealth was founded in 1970 to provide life insurance. The business expanded its offering to include wealth management and investment advice in the year 2000 when Andrew joined. It was shortly after this that the firm became licenced through Matrix Planning Solutions.

“I want to take this opportunity to thank Matrix. We’ve had a long and productive partnership with them for more than two decades and have really enjoyed working closely with the executive team and other advisers that we have met because of this relationship,” Andrew said.

“For us being self-licenced is about increasing our ability to offer sophisticated and holistic lifestyle and legacy outcomes for our clients with complex financial affairs.

“This move enhances our family office approach and allows us to better serve our long term multi-generational client base of senior executives, professionals, business owners and self-funded retirees,” he said.

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Andrew Sherlock is the Owner & CEO of Sherlock Wealth, a Sydney based financial planning firm based in North Sydney.

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 holds a Bachelor of Economics degree from Macquarie University with majors 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 of senior executives, professionals, business owners and self-funded retirees.

Andrew has featured in Forbes Magazine, in podcasts and on television. He is often asked to present at seminars and conferences and has been nominated for industry awards.

To find out more about Andrew Sherlock:

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