WHY BECOME AN INVESTMENT ADVISER?

Interested in markets, investing and helping people achieve their financial goals? A career in this industry combines all three.

Operating at the point where markets move and decisions are made, this profession holds one of the most distinctive positions in the Australian economy.

On any given morning, an investment adviser is tracking how central bank decisions are moving markets, interpreting an earnings release as it lands, and speaking with clients about what the current environment means for their capital, their business, or their long-term position. The work is live, the decisions carry weight, and the window, in many cases, will close before the end of the day.

At its core, the profession is defined by live judgement. It operates at the point where insight becomes action, not after the fact, and not in a quarterly review, but in the moment markets are moving. The clients who rely on this expertise are not looking for a process. They are looking for a partner who is already positioned when the moment arrives, able to interpret what is happening and act with clarity.

What does an investment adviser do?

Investment advisers help turn a client's goals into a clear investment plan.

They consider the client's needs, risk appetite, time horizon and long-term objectives.

They also monitor and review portfolios over time, so the strategy can adapt as markets, client needs and life stages change.

Is there a demand for investment advisers?

Demand for professional investment advice continues to grow, while the number of advisers remains relatively low. Australia has just over 15,000 advisers serving a population of around 28 million.

Australia's household wealth pool stands at approximately $4.4 trillion, growing by an estimated $400 billion per year, while the nation enters its largest intergenerational wealth transfer on record.

At the same time, client needs are becoming markedly more complex - spanning retirement drawdown, succession, tax optimisation, alternatives exposure and whole-of-wealth visibility - increasing demand for advisers equipped to operate across multiple asset classes while preserving ownership and transparency.

The long-term trends create strong career opportunities and excellent earning potential for investment advisers.

Women are shaping the future of wealth

Women are becoming more influential as investors, business owners, professionals, family decision makers and beneficiaries of intergenerational wealth. Women are set to inherit $3.2T in Australia's largest ever wealth transfer[1].

As more wealth transfers between generations, many clients will want advice from someone who understands their goals, life stages, family needs and financial priorities.

[1] *The growth of Women and Wealth: A closer look at Australia's growing cohort of high-net-worth female investors,* JB Were, 2024.

A career with purpose and opportunity

As an investment adviser, you can:

- ✓ improve clients' financial confidence and wellbeing
- ✓ support individuals and families through important financial decisions
- ✓ help clients build wealth over the long term
- ✓ develop expertise in markets, companies and the economy
- ✓ build trusted, long term client relationships
- ✓ develop a professional career with strong growth and earning potential
- ✓ contribute to a more diverse and inclusive advice profession

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