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Media Release

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Perpetual Wealth Management recruits five new senior financial advisers

Perpetual Wealth Management, one of Australia's most established wealth managers, today announces the recruitment of five new senior financial advisers to the business.

Michael Innes and Antony Pupovac will join the Private Clients team in Queensland as Partners in May, while Sandra Kent and Laura Bosman will join the Private Clients team in Western Australia as Senior Financial Advisers later this month.

Patrick Malone has recently joined as a Partner leading Priority Life, a specialist risk advisory business that is part of Perpetual Wealth Management.

Perpetual Wealth Management Chief Executive Mark Smith said: "As one of Australia's premier providers of multi-disciplinary wealth management services for high net worth clients, we're thrilled to have such great talent joining our business and welcome this group of advice professionals to Perpetual.

"The depth and breadth of their experience and skillset, coupled with our strong and dedicated existing teams will play an important role in the continued growth and success of our business."

Managing Partner Private Clients, Andrew Baker said: "Our business is focused on the comprehensive needs of clients including individuals, families, business owners, professionals and community organisations across a range of areas including strategic and investment advice, trustee services, accounting, business advisory and philanthropic solutions."

"Michael, Antony, Sandra, Laura, and Patrick bring a wealth of experience to our teams. Their diverse backgrounds and skillsets, together with their clear focus on quality client outcomes will seamlessly complement our existing teams serving clients across the country."

Sandra and Laura will further strengthen Perpetual's '*Advice for Women, by Women*' program. Launched in October 2024, the program focuses on the comprehensive and unique financial needs and goals of women by building a supportive and inclusive advice program. Close to 60% of Wealth Management's advice team are women, and women represent approximately 40% of the business' client groups.

As at 31 March 2025, Perpetual Wealth Management had more than \$21 billion in Funds Under Advice. This included net inflows of \$0.9 billion during the March quarter.

“Our business has grown year-on-year for the past decade and the industry is well-placed to grow, which will make high-quality advice more important than ever. We are always looking for exceptional people to join the firm,” said Mr Smith.

Biographies

- Michael Innes and Antony Pupovac each have more than 25 years’ experience in the Queensland high net worth advice market. They have worked together as a team for the past 17 years, with the last 12 years at Ord Minnett where Antony was a Senior Private Wealth Adviser and Michael as a Senior Investment Adviser. Prior to Ord Minnett they also worked as a team at CBA Private for five years.
- Sandra Kent has more than 15 years’ experience in financial services and wealth management roles, most recently as a Senior Financial Adviser with Grace Life & Wealth in WA. Sandra has previously held roles with Profacc, WestCoast Wealth, Bankwest, CBA and Macquarie.
- Laura Bosman has a background in accounting and more than 12 years’ experience providing strategic financial and investment advice to UHNW family groups and non-profits in former roles with boutique financial advice firm, The Wealth Designers; multi-family office, The Myer Family Company; and most recently as an Investment Manager for a single-family office.
- Patrick Malone has 15 years’ experience in the financial advice industry and most recently worked as General Manager of PSK Private Wealth in Melbourne.

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About Perpetual Wealth Management

The wealth management business consists of three distinct brands in addition to Perpetual Private – Fordham, Jacaranda Financial Planning and Priority Life – offering a unique mix of wealth management, advice and trustee services. With a diverse range of capabilities including strategic advice on superannuation and retirement planning, general investment, asset protection, insurance, tax management, estate planning, aged care, social security, succession planning and philanthropy. Our clients include individuals, families, businesses, not-for-profit organisations and Indigenous communities throughout Australia.