



Pemba
Capital Partners



Hewison Private Wealth

Hewison Private Wealth is a leading independent wealth advisory firm, providing bespoke investment advice, family office and SMSF services, alongside risk protection and estate planning services to private clients across Australia since 1985.

BASE CAMP

Financial Services

Hewison Private Wealth

Pemba has partnered with Hewison Private Wealth, a leading independent wealth management and financial advisory firm based in Melbourne, with a 40-year track record advising private clients across Australia.

THE PARTNERSHIP

Pemba will support Hewison to invest in its advisers, people and technology, deepening client relationships as the business broadens ownership across its team and continues its 40+ year track record of growth.

ABOUT HEWISON

Founded in Melbourne in 1985, Hewison Private Wealth is one of Australia's longest-standing independent financial advisory firms. The business provides financial planning, investment management, superannuation, retirement and estate planning services to private clients, family offices and business owners across Australia. Operating under a single AFSL, Hewison's team of Certified Financial Planners has built a reputation for independent, commission-free advice and strong client retention. The firm manages almost 3 billion in funds under advice on behalf of its client base.

BACKGROUND TO THE PARTNERSHIP

Pemba has strong conviction in wealth management, a sector benefiting from compulsory superannuation inflows, the coming intergenerational wealth transfer and recent changes to capital gains tax settings. Hewison stood out for its track record of organic growth, exceptional client retention and a diversified, long-tenured adviser team. As part of the partnership, Pemba and the existing Hewison shareholders will broaden ownership of the business to a wider group of Hewison's advisers, while retaining the team central to client relationships and securing the firm's long-term continuity.

THE VENDORS PERSPECTIVE

“After a careful, selective process, we chose Pemba because they understood exactly what makes Hewison different and were drawn to it, not looking to change it. This partnership gives us the capacity to invest further in our people, technology and service, while our independence, leadership and client relationships remain unchanged.”

ANDREW HEWISON, MANAGING DIRECTOR, HEWISON

THE FUTURE

Pemba sees an opportunity to support Hewison in furthering its position as the best-in-class adviser for private clients. Pemba will support the firm to deepen its adviser bench, broaden its service offering, and selectively consider potential M&A opportunities, while preserving the independent, client-first advice model that has defined Hewison since 1985.

ABOUT PEMBA

Pemba Capital Partners is a leading investor in the Australian and New Zealand financial services sector, with other relevant investments in companies such as SuperConcepts, Bravas, and Acis.

Pemba is actively looking to partner with other high-quality opportunities in financial services. If you are considering external investment and would like to learn more about how a partnership with Pemba works, get in touch at opportunities@pemba.com.au.

PEMBA CAPITAL PARTNERS HAS EXPERTISE IN THE FOLLOWING SECTORS

Financial Services / Business Services / Healthcare / Education & Training / Non-Bank Technology.



More about Hewison Private Wealth