Adviser profile

ShawandPartners

Sean Conlan

Senior Adviser

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"I specialise in looking after Australian equity portfolios for a selected group of high net worth, sophisticated investors."

View my LinkedIn Account

Sean joined Shaw and Partners in 2015 having previously worked for 15 years at Macquarie Group. Sean has over 30 years of experience in financial services encompassing trading, portfolio and risk management, equities, derivatives, bonds and fixed interest. Sean specialises in looking after the investments of a select group of sophisticated investors and institutional clients looking to invest over the medium-long term. His areas of expertise include:

- Provision of tailored personal advice
- Portfolio management and construction
- Derivatives trading strategies
- Managed Discretionary Service
- Investment advice to Self Managed Super Funds

Wealth Management Solutions

Sean focuses on portfolio solutions for long term clients. This encompasses portfolio construction by diversifying across large cap Australian blue chip companies with proven earnings power and quality management through to emerging to mid cap companies with outstanding growth potential. The use exchange traded options is also utilised to either increase yield or reduce volatility.

Sean offers clients a complete spectrum of stockbroking strategies and his success has been built on his extensive market knowledge, attention to detail, transparency and quality of service.

In line with Shaw and Partners' best financial practices, Sean works in partnership with clients to understand their unique financial circumstances and determine an appropriate investment strategy. Irrespective of your investment style Sean can assist with:

- Asset allocation and risk management
- Dividend (with franking) yielding ideas to supplement capital growth
- Tactical and strategic recommendations using Shaw and Partners' Research
- Initial Public Offerings and Shaw and Partners sponsored stock placements
- Alternative asset classes (ETF, Managed Funds)
- Trading ideas focused on your investment goals

Accreditations

- Accredited Derivatives Adviser (ADA 1 + 2)
- ASIC Accredited in Margin Lending & Geared Investments

About Shaw and Partners

Shaw and Partners is one of Australia's preeminent investment and wealth management firms. With a national presence and $10 billion of assets under advice, Shaw and Partners offers the intimacy of a boutique investment firm with the resources and scale of a major financial group.

We are privately owned and client focused, having helped our clients manage and grow their financial assets for more than 25 years. Our emphasis on integrity and stringent compliance standards has enabled us to achieve very high levels of client satisfaction, while unlocking opportunities of significant value. By working closely with our clients, we have forged long-term relationships. Whether you are a private investor, high net worth individual, charity, institution or corporate client, our focus is simple: listen to you then act according to your objectives.

Welcome to Shaw and Partners. Your partners in building and preserving wealth.