

# Wedgebloom® is an investment management boutique.

We provide customised financial planning, investment advice and wealth management services to private clients and their businesses in Australia and overseas.

## Wealth Mentoring

A tailored, integrated private wealth management approach that covers clients' investments (uses of wealth) and business affairs (sources of wealth) alike.

[read more](#)

## International Investment Management

A specialised portfolio management service that promotes and provides gateways between Latin America and Asia Pacific.

[read more](#)

## Wedgebloom was established in Australia in 2010

A registered Australian company with head office in Sydney and roots in Brazil, the company was founded by [Eduardo Damasceno-Ferreira](#), a Brazilian - Australian who leads the business as Director and Principal.

Wedgebloom Pty. Ltd. is an Australian Financial Services licensee, authorised to advise and deal in the following financial products: shares, bonds, managed funds, securities, deposit and payment products, derivatives and foreign exchange contracts, to wholesale clients.

Wedgebloom Financial Pty. Ltd. as an Authorised Representative of Lifespan Financial Planning, works with retail and wholesale clients to offer comprehensive financial planning services. These include investments, superannuation, retirement planning and risk management (life insurance).

### Compliance

With a foundation built on trust, expertise and commitment, Wedgebloom's business processes are compliant with all applicable local and international laws and regulations.

The company proudly and voluntarily adheres to the CFA Institute Code of Ethics and Standards of Professional Conduct.

### Licence

Wedgebloom Pty. Ltd. holds an Australian Financial Services Licence (AFSL 404300)

Wedgebloom Financial Pty. Ltd. is an Authorised Representative (AR Nr. 412902) of the Lifespan Financial Planning Pty.Ltd., AFSL 229892

## How we work

### **We practice what we preach.**

We believe each investor is unique. There are no two identical profiles, histories or aspirations.

Every client deserves the best, regardless of their assets or financial sophistication. We only work with clients whom we are confident we can make a difference. If we don't believe we can, we will say so.

Wedgebloom truly acts as a client's agent and we are remunerated exclusively by the client. We are not a sales-force for any large financial institution. Therefore, we do not sell any particular financial product but rather help clients find the products that suit them best. Our client relationships are long-lasting and built on mutual trust.

Our people are multilingual with decades of international training and executive experience in business, investment and corporate finance across a range of industries.

Wedgebloom's founder is a Graduate member of the Australian Institute of Company Directors (GAICD), hence prepared to hold directorship positions in the board of private and public companies, as well as not-for-profit organisations.

## Founding principles

**Trust**

**Expertise**

**Commitment**

## Meet our founder

Eduardo Damasceno-Ferreira has extensive experience as both user and provider of financial and investment services.

Eduardo is a Brazilian-born Australian citizen, started his career in Germany, earned an MBA degree from INSEAD in France and pursued executive finance studies at the Wharton School in the USA. He has over 25 years of international professional experience in Latin America, Europe and Australia. Since 2010 Eduardo lives in Sydney with his wife and daughters.

Mostly as Chief Financial Officer, Eduardo has high-end executive experience in industries such as media and entertainment, utilities, and has also been Chief Investment Officer of a pension fund and a

### Experience

For 13 years leading to the end of 2009, Eduardo worked as CFO and C.F.O. of Grupo RBS, one of the largest Brazilian media companies. At the same time, he also served as Chief Investment Officer of RBS sponsored pension fund and as non-executive Director of a pay-TV and telecom company in Latin America.

Eduardo has also worked as CFO for RGE, a power distributor, previously as investment banker at Deutsche Bank. His first role was developed at Fraunhofer-IPA, a high technology R&D company, a control systems manufacturer, both roles in Stuttgart, Germany, and at Zivi-Hercules, a consumer goods manufacturer with operations in Brazil.

### Education

Eduardo is a graduate electronic engineer (Brazil) and holds an MBA degree from INSEAD (Fontainebleau, France).

He pursued advanced finance studies at the Wharton School of the University of Pennsylvania (USA), and holds an Australian Diploma in Financial Services (Financial Planning)

He is a Graduate of the Australian Institute of Company Directors (GAICD) and a CFA® (Chartered Financial Analyst) Level III candidate.

*DUC: Eduardo mentioned that he wanted to include a bit about Samuel later on. I have asked Samuel for some info now so we can build it in. I think adding a nav point as above would work well – and we can add the paragraph like this or point to a new page*



Eduardo Damasceno-Ferreira

### Meet Samuel Kunrath

Samuel commenced his career within the superannuation industry in 2001. In 2003, he joined the RBS Group, one of the largest Brazilian media conglomerates, working as a financial analyst until 2007. In 2011, Samuel joined Wedgebloom and became an Authorised Representative of Lifespan.

He completed his Bachelor of Business Administration in the Catholic University of Rio Grande do Sul (2006) and his Master of Commerce (International Finance) in The University of New South Wales (2009). Samuel also holds a Diploma of Financial Services (Financial Planning) from Kaplan (2011) and is a Level I candidate to the CFA programme.



[Links to useful FS sites](#)

[Wedgebloom News](#)

[Disclaimer](#)

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## Our services

Wedgebloom has been managing Australian and Asia-Pacific portfolios for Latin American investors for a couple of years and we are now extending our services to Australian based clients as well.

Through our international background and dual perspective in finance and business, Wedgebloom has the skills, experience and attitude necessary to excel in the business we are in.

**As a specialised investment management boutique, we can provide:**

### **A gateway to Asia-Pacific**

For Latin American private and institutional investors, via the Australian financial markets. [read more](#)

### **Wealth Mentoring™**

For Australian based investors, offering a comprehensive wealth management and business governance advisory service. [read more](#)

Working with you

# Wealth Mentoring

Wedgebloom Wealth Mentoring™ is primarily suited to emerging high net worth individuals and families, such as entrepreneurs, heirs, professionals, sports people and artists.

Our differentiated approach brings together investment and business ownership advice for clients in early, steep or transitional stages of wealth accumulation.

We believe an effective wealth management service should address clients' uses of wealth (investments) as well as their sources of wealth (business), because these are intrinsically linked segments of the same chain.

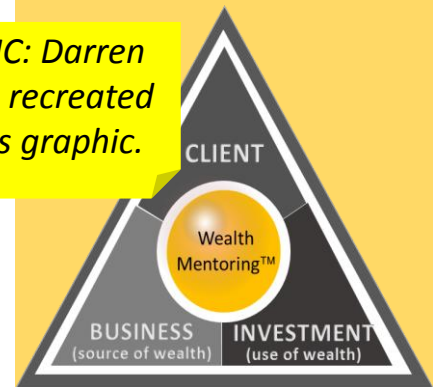
Our ultimate aim is to help clients achieve their financial goals, subject to their individual constraints and addressing biases that might exist. At the centre of our business process is the design of a tailor-made **Investment Policy Statement**, explicitly containing objectives, constraints and metrics that serve as the guideline for each and every client engagement.

In order for us to consistently deliver the high standard of service we promise, we prefer to work with a limited number of clients that we are confident we can impact positively.

Wedgebloom's focus is to grow alongside our clients, rather than simply inflating our client base, which we believe could result in a standard of service that the client could obtain elsewhere.

**Wealth Mentoring™** is an innovative, comprehensive wealth management approach which expands the scope of financial advice to encompass investments and business alike.

*DUC: Darren has recreated this graphic.*



Every wealth management story is different. At Wedgebloom, we work with you to tailor financial solutions to your needs.

## Working with you

# How we work with you

Our value proposition is built upon trust, expertise and commitment.

### **Our clients can expect to achieve:**

- An in-depth understanding of their return objectives, risk tolerance and behavioural profile towards investing.
- Knowledge of the business and investment environment they are exposed to
- Wealth productivity
- The confidence to make financial decisions
- The peace of mind that their finance affairs are permanently (not only periodically) looked after

### **Our Wealth Mentoring™ services bring together:**

- Investment management and financial planning
- Business ownership advice and governance representation
- Financial and business education coaching
- Liaison with other professional services providers (bankers, brokers, tax, legal, migration, recruiting, real estate, among others )

Wedgebloom, through the dealer group Lifespan, can provide access to a broad range of investments, including but not limited to; managed funds, shares, bonds and term deposits.

We also advise in the whole range of financial planning services, such as risk management (life insurance), superannuation and retirement planning.

Wedgebloom adheres to the CFA Institute Code of Ethics and Standards of Professional Conduct, which we strongly encourage every client and prospect to learn more about. [Read more](#)

## Our promise

The Wedgebloom philosophy is to under-promise and over-deliver.

This does not imply guarantee of a positive performance (as a matter of fact, no one should guarantee that).

What we can and do guarantee is that all our expertise and commitment is devoted to achieving the highest possible risk-adjusted returns for our clients, in compliance with applicable laws, regulations and the Investment Policy Statement agreed upon.

# International Investment Management

Wedgebloom is the first (and hitherto the only) financial services boutique of Brazilian background, established in Australia.

Being locally based and well connected with multi-lingual staff makes Wedgebloom the best gateway for Latin American based private investors and family offices, to directly allocate assets in the Asia-Pacific financial markets.

Wedgebloom is also a licensed fund manager in Australia. In the near future we intend to offer Australian investors the opportunity to allocate assets in the Latin American markets.

- We operate within a truly product-agnostic environment, with access to virtually all investment products based and regulated in Australia. [See how we operate](#)
- We provide the gateway to access a wide range of Asian and global funds, as well as numerous hedge funds and other alternative investment products [Read about the Asia Pacific gateway](#)



*DUC: Darren has recreated this graphic.*

## How we operate

Wedgebloom operates from Australia to offer access to Asia-Pacific financial investments with customised, systematic and transparent portfolio management services.

We apply human and technological resources alike. Asset allocation, portfolio construction and optimisation tools complement sound knowledge and a broad network of contacts.

The use of investment platforms enables access to high ticket wholesale funds and facilitates cost effective online monitoring with flexible and comprehensive reporting.

**We are exclusively remunerated by the client. Our charges are asset-based fee-for-services and we do not charge performance fees.**

Wedgebloom can conduct business in English, Portuguese, German or Spanish.

Through our network of qualified external partners we also assist clients in related areas such as legal, accounting, tax, insurance, real estate and migration. We can facilitate migration agents` services particularly in relation to the Australian Significant Investor Visa (SIV), introduced in November 2012, under which foreign investors may be granted Australian resident status.

### Duty of care

Our client portfolios are managed for risk-adjusted total returns, according to the objectives and constraints established in each Investment Policy Statement.

Nobody can (or should) guarantee investment performance. But we can assure all our clients that their financial affairs are always treated in their best interest, under the highest standards of ethics, professionalism, transparency, prudence and care, regardless of the magnitude of their accounts.

## Your Asia Pacific gateway

Global investors can no longer afford to stay out of Asia. Australia is an increasingly important financial hub in this region.

Asia Pacific is the world's fastest growing region and Australia is the largest domicile of managed investment funds in Asia (and 3rd in the world), with total assets above \$1.5 trillion. The Australian Dollar is one of the strongest currencies in the world and the Australian Stock Exchange is ranked 5th in market capitalisation of listed companies, behind USA, Japan, UK and Canada, ahead of China, Hong Kong, India and Singapore (*source: Austrade, Australia Benchmark report 2012*).

Australia has an attractive tax regime for non-resident investors, whereby capital gains and dividends are not taxed and interest income is only subject to 10% withholding taxes.

Wedgebloom operates within a truly product-agnostic environment, with access to virtually all investment products based and regulated in Australia.

**This allows us to offer our clients a wide range of term-deposits, exchange-traded securities, specialised Asian and global funds, as well as numerous hedge funds and other alternative investment products.**

## Contact Us

We welcome the opportunity to assist you.

Please feel free to contact us to find out how we can help.

Tell us about yourself below and we can respond to you with information that is most relevant to you.

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[www.wedgebloom.com.au](http://www.wedgebloom.com.au)

Note: fields marked with a \* are required

|               |                      |               |  |
|---------------|----------------------|---------------|--|
| Business Name | <input type="text"/> | Phone Number  | <input type="text"/>                   |
| First Name*   | <input type="text"/> | Last Name     | <input type="text"/>                   |
| Email*        | <input type="text"/> | Mobile Number | <input type="text"/>                   |
| Subject       | <input type="text"/> | Country       | <input type="text" value="Australia"/> |
| Message*      | <input type="text"/> |               |  |

[Send Message](#)

*NB: Last name  
also mandatory*

## Useful links

We have pulled together some useful links for you.

If there are other links you would like to see here, let us know and we will add them.

*NB: Keep alphabetical order*

*Duc – the layout of this page depends on how you can set this up in ABC so it can be added to easily by the client*

|   |  |                            |  |  |                            |
|---|--|----------------------------|--|--|----------------------------|
|    | Australian Securities Exchange<br>       | <a href="#">Click here</a> |    | Inst Bras Geografia e Estatística<br>   | <a href="#">Click here</a> |
|    | AUS Sec & Investments Commission<br>     | <a href="#">Click here</a> |    | Investsmart<br>   | <a href="#">Click here</a> |
|    | AUS-BR Chamber of Commerce<br>           | <a href="#">Click here</a> |    | Lifespan FP<br>   | <a href="#">Click here</a> |
|    | Australian Bureau of Statistics<br>   | <a href="#">Click here</a> |    | Morningstar<br>   | <a href="#">Click here</a> |
|    | Australian Taxation Office<br>  | <a href="#">Click here</a> |    | NineMSN Finance<br>   | <a href="#">Click here</a> |
|    | Banco Central do Brasil<br>              | <a href="#">Click here</a> |    | Reserve Bank of Australia<br>   | <a href="#">Click here</a> |
|    | Bloomberg<br>   | <a href="#">Click here</a> |    | Receita Federal do Brasil<br>  | <a href="#">Click here</a> |
|    | BM&FBovespa<br>                          | <a href="#">Click here</a> |    | Reuters<br>   | <a href="#">Click here</a> |
|   | CFA Institute<br>   | <a href="#">Click here</a> |   | Sydney Morning Herald<br>   | <a href="#">Click here</a> |
|  | Comissão de Valores Mobiliários<br>  | <a href="#">Click here</a> |  | The Australian Financial Review<br>   | <a href="#">Click here</a> |
|  | Economist Intelligence Unit<br>   | <a href="#">Click here</a> |  | Valor Online<br>  | <a href="#">Click here</a> |
|  | Financial Times Asia<br>  | <a href="#">Click here</a> |  | Yahoo!7 Finance<br>   | <a href="#">Click here</a> |

# News

(to include press releases / new client news / Industry news)

*NB: Set up this plain page as a quick link in the universal footer – but don't make it live.*

*The client can publish it when they have some news to put up.*

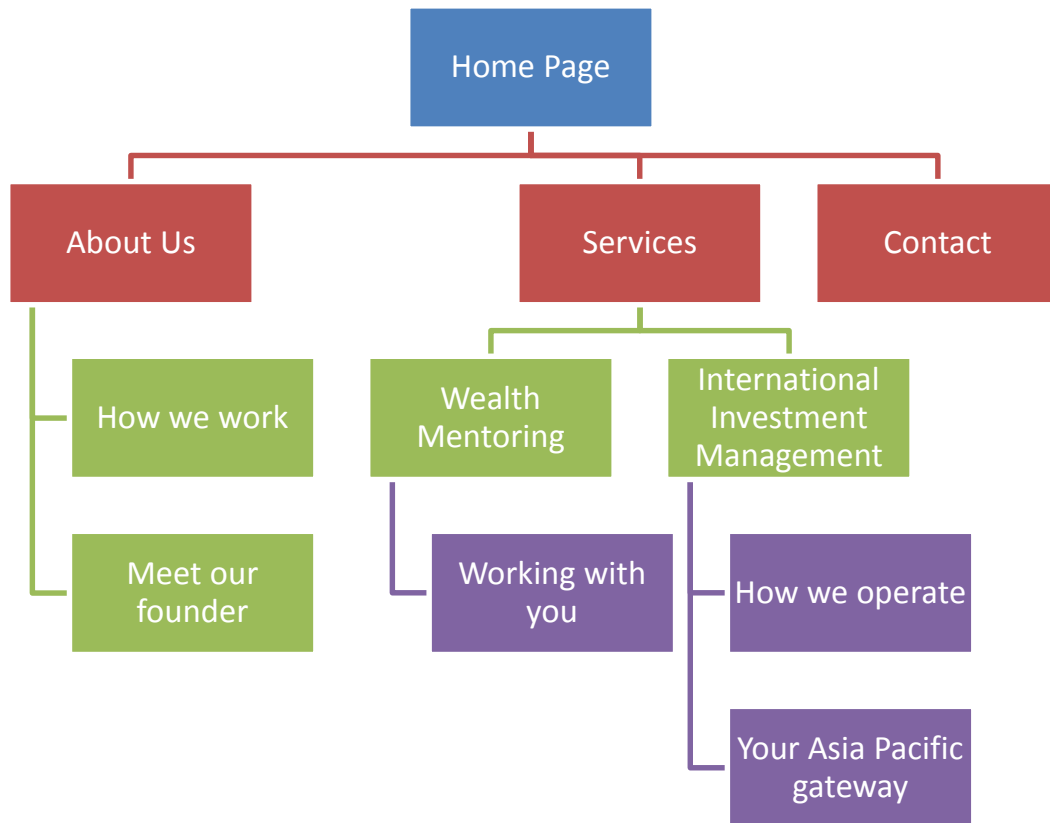
## Disclaimer

The content of this website does not constitute financial product advice and should not be relied upon as such.

Nothing in this website should be regarded as an advice, a promise or an offer of any kind. Instead it is intended to be representational and informative materials of a general nature for discussion purposes.

Wedgebloom is licensed or represents a licensee to provide financial services in Australia. In case you have an interest in engaging in any financial investment outside Australia, we recommend you obtain personal financial, legal and tax advice from due licensed professionals at that jurisdiction.

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*NB: This page is not part of the website – it is just here for reference to the sitemap*