EVANS &
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The Evans and Partners Executive Program

Welcome

We are one of Australia's largest private wealth firms

$33bn+
FUNDS UNDER ADVICE

50
PRODUCT AND RESEARCH SPECIALISTS

7,400+
PRIVATE CLIENTS

88
ADVISERS

*all figures are as at 1 June 2026

EVANS & PARTNERS



Ben Keeble
Managing Director and CEO
E&P Financial Group

Why the right advice matters

A message from our CEO

Since 2007, Evans and Partners has been committed to providing trusted, highly personal advice to individuals and families. This client-first philosophy has been central to our growth as a private wealth firm and continues to guide our work today. With over 88 professionals advising on $33 billion in funds on our platform, we remain focused on delivering considered and consistent outcomes, built on strong relationships, deep expertise and collaborative thinking.

With over thirty years of experience in financial services, I have seen firsthand how critical it is for executives and business owners to receive the right advice at the right time. Managing your own, often complex, financial affairs whilst navigating professional and personal responsibilities can be challenging. In my experience, it is not just about receiving expert advice – it is about guidance that is timely, aligned with your goals, and delivered with the discretion and confidence that comes from a trusted partnership.

The Executive Program was developed with these needs in mind. As a client, you gain access to the full breadth of our capabilities, with an added layer of attention, privacy and strategic rigour. Your adviser team will act as a true partner – proactive, responsive and deeply aligned to your goals. Supporting this team are some of the country's most experienced investment professionals across asset allocation, product selection, strategic advice, SMSF accounting, and research, collaborating to ensure your entire wealth position is considered from every angle.

Above all, this is a program designed to give executives confidence that their financial affairs are being managed with the same discipline and strategic focus that they bring to their careers.

Ben Keeble
Managing Director and CEO
E&P Financial Group

Expertise that unlocks opportunity

Your financial needs go beyond the standard approach – so should your advice

- Strategic financial advice
- Investment advice
- Asset structuring and tax planning
- Sustainable investment advice
- Retirement and superannuation planning
- Liquidity events and cashflow planning
- Family Investment Office
- Philanthropic giving
- Succession planning & wealth transfers

Why choose Evans and Partners?

Modern ideas, traditional service

We combine the resources and expertise of a large diversified financial services firm with the discretion, confidentiality, and highly personalised service of a boutique advisory firm.

Experts in what we do

As an expert in your field, you understand the value in seeking out the right experience and expertise. When it comes to your financial wellbeing, this means speaking to the Head of our Executive Program. This executive product gives you leverage to the best people across the E&P platform from our CIO office to our other various teams.

We act as your personal CFO

In your business, the CFO simplifies complex financial information into clear insights to support strategic decisions. We play a similar role in your personal financial life, acting as your personal CFO. We work closely with your accountant and other professional advisers to consolidate, coordinate, and distill the information that matters, so you can make informed, forward-looking decisions with confidence.

Efficient solutions

Time is your scarcest resource, and balancing financial wellbeing with professional and personal commitments can be challenging. We've designed an efficient investment platform to reduce administrative burdens, so you can focus on what matters most.

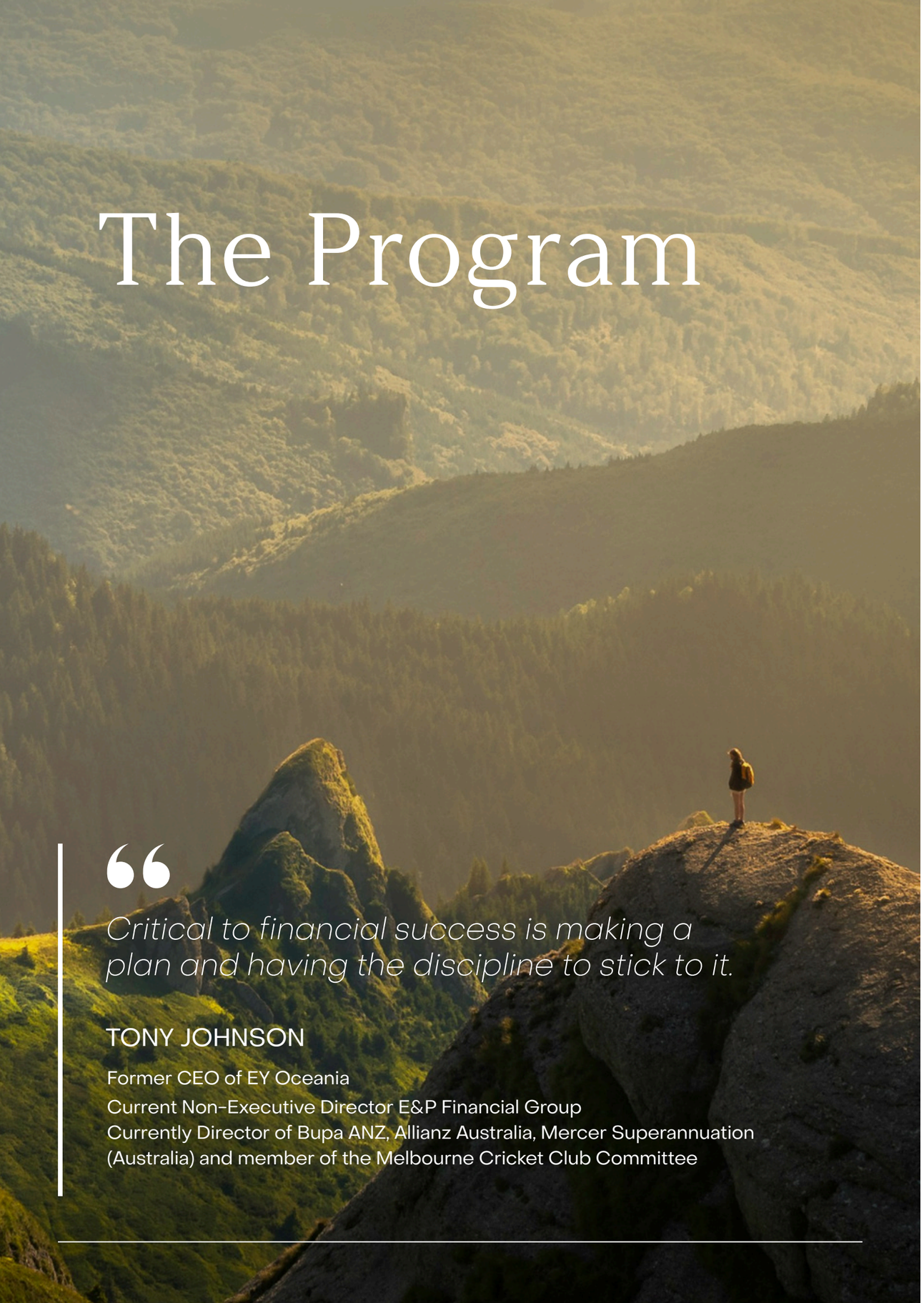
Trust & discretion

We work with people buying and selling businesses, navigating major wealth events, and making decisions that shape their financial futures. These moments often involve highly sensitive information — we don't take lightly the trust you place in us by sharing it. Discretion is at the core of how we operate. You can be confident that everything you share is handled with the highest level of confidentiality.

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We exist to help our clients prosper

The Program



> *Critical to financial success is making a plan and having the discipline to stick to it.*

TONY JOHNSON

Former CEO of EY Oceania
Current Non-Executive Director E&P Financial Group
Currently Director of Bupa ANZ, Allianz Australia, Mercer Superannuation (Australia) and member of the Melbourne Cricket Club Committee

What is the Evans & Partners Executive Program?

Executives face a unique set of financial challenges that require specialised expertise. Whether you're a business owner planning for a liquidity event, an investment professional with variable remuneration, or a CEO trying to maximise your accumulation years, your financial needs go beyond the standard approach and therefore so should your advice. The Executive Program is designed for those who require tailored, strategic advice from specialists who understand the intricacies of executive wealth — ensuring your finances are managed as effectively as your career.

Who is the program suited to?

- Executives
- C-Suite
- Business owners & founders
- Board directors
- Investment managers
- Professional services partners



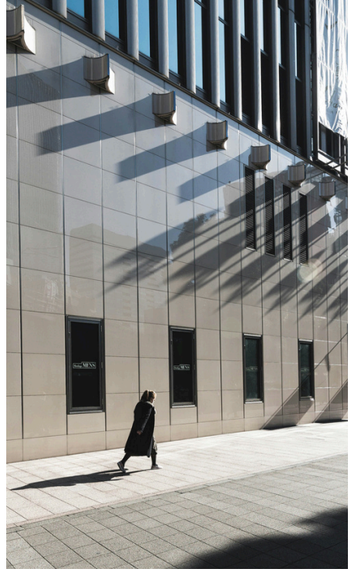
How We Help

Maximise your accumulation years

Your peak earning years offer a powerful opportunity to accelerate your financial position. Our advice provides tailored strategies to grow, preserve, and structure your wealth for the future.

ISHARA RUPASINGHE

Executive Director
Senior Strategy Adviser

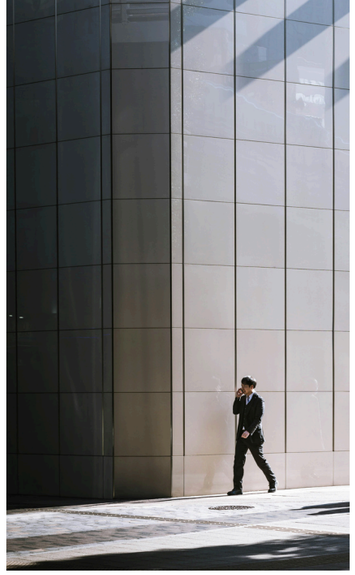


THE Investment Manager

A high-performing professional with limited time and significant financial commitments, including mortgages, travel, and education expenses. Their remuneration is closely tied to fund success, resulting in irregular and variable bonus structures.

How we help

- Cash flow and liquidity management
- Diversified wealth building
- Asset structuring
- Tax optimisation
- Debt and mortgage structuring
- Optimising superannuation
- Asset allocation and investment strategy development
- Tax effective debt restructuring



THE C-Suite

Senior executive in an ASX-listed or large private company, with significant professional demands and limited time to manage personal finances. Typically earning a high salary with potential short and long-term incentives, and subject to strict compliance, trading windows, or investment restrictions. Likely to have a growing complexity of wealth as income, assets, and responsibilities increase.

How we help

- Executive remuneration structuring and strategy
- Investment advice within trading and compliance constraints
- Tax management and asset structuring
- Superannuation optimisation and long-term wealth planning
- Estate and legacy planning
- Intergenerational wealth transfer advice
- Debt structure optimisation



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THE Founder

A business owner with the majority of their wealth concentrated in their company. They may receive significant annual dividends and anticipate a liquidity event or business sale within the next five years. Given their focus on business growth, they may not have optimised superannuation contributions or long-term wealth diversification.

How we help

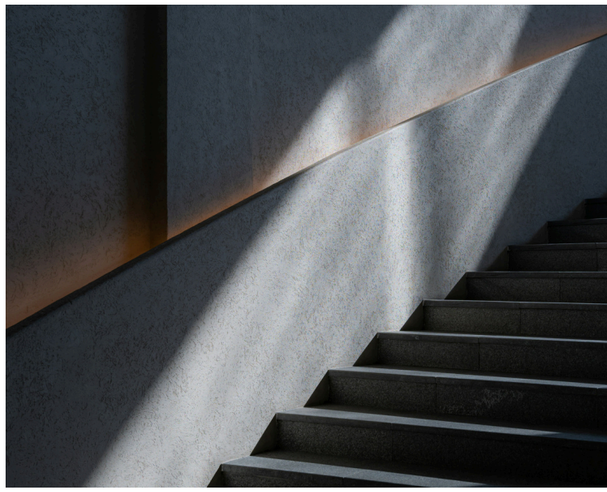
- Cash flow and dividend management
- Diversification and wealth extraction
- Maximising superannuation
- Tax planning and structuring
- Liquidity event planning
- Philanthropy planning
- Long term investment strategy and retirement planning
- Estate and legacy planning
- Divestment advice

Benefits & Features of The Program

> *E&P's acumen and investment proposal also matched their impressive relationship qualities... I would happily recommend them to any other company, individual or for-purpose organisation seeking a strong investment management partner.*
>
> EVANS AND PARTNERS CLIENT

EVANS & PARTNERS

The Executive Program is a highly tailored wealth management solution exclusively designed to address the complex financial affairs of executives. Delivered with the utmost confidentiality, the program offers access, strategic foresight, and personalised advice to help you and your family manage and grow your wealth.



Investment & Wealth Management

Specialised Advisory Team
A dedicated Investment Adviser who will be responsible for your comprehensive investment strategy and a dedicated Strategy Adviser who will be your point of contact for all things structuring, planning and tax.

What this means for you
You advisory team consider your entire situation when building your financial plan.

Bespoke Portfolio Management
Tailored investment strategy aligned to your goals, life stage, liquidity needs and growth ambitions.

What this means for you
Your Advisers will work with you and your family to develop a comprehensive family investment policy and asset allocation strategy.

Access to Exclusive Investments
Priority invitations to invest in institutional-grade, wholesale, alternative investment opportunities.

What this means for you
Access to opportunities that are generally only available to Institutions and Family Offices.

Sustainable Investment Integration
Opportunity to align your portfolio with your values, without a performance trade-off.

What this means for you
You can ensure your portfolio is invested in line with you and your family's values.

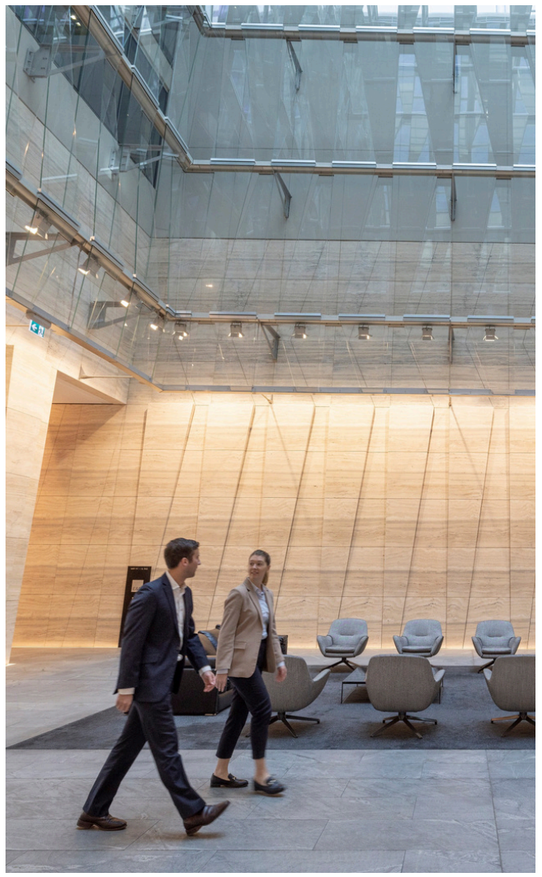
Simplified Administration and Reporting
A single, streamlined platform for execution, cash flow, and performance and tax reporting.

What this means for you
Engaging and relevant performance reports. Tax reporting delivered directly to your accountant.

BENEFITS & FEATURES CONTINUED







Exclusive Access & Engagement

Private Executive Network
Connect with like-minded executives and industry leaders through an exclusive peer network.

What this means for you
Learn from others navigating similar wealth events, leadership pressures, and career transitions.

Macro Roundtables
Exclusive invitations to quarterly roundtables with Chief Investment Officer, Tim Rocks.

What this means for you
Understand how the global and domestic macro environment can influence your business and your investment portfolio.

Bespoke Family Wealth Series
Participate in our Family Office series of events.

What this means for you
Hear from founders, investors, philanthropists and family office Advisers to understand what comes after the liquidity event.

Financial Strategy & Planning

Debt Considerations
A review of how debt can strategically be used to reduce tax and maximise returns, including whether your current non-deductible debt could be converted into deductible debt.

What this means for you
Through adopting a different debt structure you could potentially significantly reduce your post tax interest costs.

Succession & Estate Planning
Collaboration with estate lawyers, advice regarding intergenerational wealth transfer, and assistance establishing family trusts, philanthropy vehicles, family charters and other governance structures.

What this means for you
Your family's future is considered at every stage for your financial plan.

Tax & Structuring Advice
Advice that optimises your structures to future proof your assets and tax position in preparation of future wealth events.

What this means for you
An annual private tax planning session with your Strategic Financial Adviser, ensuring you are prepared for June 30.

Strategic Planning
Strategic planning ahead of a major wealth event such as a business sale, IPO, inheritance or material incentive plan.

What this means for you
Confidence you have the most tax effective ownership structures in place before a major wealth event occurs.

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Start a Conversation

Partner with a firm that understands the complexity of your financial world. Connect with us and take a more deliberate approach to managing your wealth.



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The Financial Services Guide of Evans and Partners contains important information about the services we offer, how we and our associates are paid, and any potential conflicts of interest that we may have. A copy of the Financial Services Guide can be found at www.eandp.com.au. Please let us know if you would like to receive a hard copy free of charge.

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