

# Proud History. Strong Future.

Earlier this year, Patersons welcomed Tolhurst clients and staff in a merger that created one of Australia's largest and strongest full service stockbroking and financial services firms.

The firm has provided trusted and considered advice for over a century and, incorporating Tolhurst and William Noall, now has more than 480 staff in 18 locations nationwide.

Patersons has a significant presence in all major capital city markets and a number of dynamic regional centres. Our offices are located in Perth, West Perth, Geraldton, Bunbury, Busselton, Albany, Kalgoorlie (WA), Melbourne, Mount Waverley (VIC), Sydney, Lismore (NSW), Adelaide (SA), Brisbane, Gold Coast, Cairns, Gladstone, Sunshine Coast (QLD) and Canberra (ACT).

The recent expansion has seen the firm double in size. As a result, Matt Wigzell has joined Steve Morris as National Head of Private Clients, both located in Melbourne. Matt and Steve held equivalent roles in Patersons and Tolhurst before the merger. "With the addition of well over 100 Advisers, Matt and I are focusing on helping our team provide superior service to our client base," said Steve.

Tony Porter was recently appointed Branch Manager in Sydney and Ashley Brandon in Brisbane; both have expanded teams under their management. Meet some of our experts, see page 11.

“With more analysts joining the research team, our coverage has grown beyond our historical niche ...”

Patersons now has more than 290 Advisers and a team of 19 research analysts and strategists. With more analysts joining the research team, our coverage has grown beyond our historical niche of small to mid cap resources and mining services companies to include a broad range of larger cap companies across numerous sectors.

Dr Amin Abdullah was recently appointed Patersons Non-Executive Director following Brunei Investment Agency (BIA) subsidiary, Nudhar Corporation's 20% investment in the business. "We see this as an important strategic investor, but it also provides us with the flexibility and capacity to further grow the business," said Patersons Executive Chairman, Michael Manford.

## Recent Achievements

- Recently, Sagient Research Systems, a leading publisher of independent research for the financial services and institutional investment communities, announced that Patersons ranked as the most active investment bank for private placements by public issuers in Australia during the first half of 2009.
- Turnover upwards of \$15.8 billion in equities per annum.
- Over \$1 billion in assets under management or administration.
- Standard & Poor's Fund Services assigned a 'Three Star' rating to the Patersons 80:20 Equity Fund - a very strong rating for a new fund and asset management business. The fund is also 'Approved' with Zenith. The Wholesale 80:20 Equity Fund was launched early this year.

Patersons History Timeline - 1990 to present day	
1990	1992 - The Financial Planning Department was established to compliment our Private Client Services
	1993 - The Corporate Finance Department was established
	1994 - Michael Manford was appointed Executive Chairman
	Late 1990s - WA regional offices in Busselton, Bunbury and Albany opened
2000	2002 - Melbourne office opened
	2003 - Employees bought back 50% holding from JP Morgan
	2003 - Sydney and Kalgoorlie offices opened, Centenary Year
	2004 - Canberra office opened
	2005 - West Perth office opened
	June 2007 - Patersons Asset Management division was established
	2008 - Brisbane office opened
	January 2009 - Patersons merged with Perth-based stockbroking business Montagu
	April 2009 - Patersons merged with national stockbroker Tolhurst and William Noall, expanding with additional offices in Adelaide (SA), Gold Coast, Gladstone, Cairns, Sunshine Coast (QLD), Geraldton (WA), Lismore (NSW) and Mt Waverley (VIC).



## Take the work out of investing

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