

MEDIA RELEASE – 1 October 2025

Shadforth Financial Group bolsters Victorian footprint with acquisition of PMD Financial Advisers

Shadforth Financial Group (Shadforth) has successfully acquired PMD Financial Advisers (PMD), a boutique financial advice firm specialising in high-net-worth clients. Based in Melbourne, the acquisition further strengthens Shadforth's footprint in Victoria.

The transaction, completed on 30 September, will see five staff and almost 400 clients join the Shadforth network, adding over \$700 million in funds under advice.

The acquisition supports Shadforth's broader strategy to build national scale. It complements strong organic growth – driven by client referrals and increasing demand for quality financial advice – with targeted inorganic activity that adds capability, talent, and operational efficiency.

Terry Dillon, CEO of Shadforth, said: "We're excited to welcome the highly experienced PMD team to Shadforth. This was a considered acquisition that aligns with our long-term growth ambitions, advice model, and investment philosophy.

"With more Australians seeking high quality financial advice, we're focused on scaling our capacity in a way that preserves the quality of our service while supporting continued growth. Talent remains one of the most valuable resources in our industry, and our ability to attract and retain skilled financial advisers is essential to maintaining trusted client relationships and delivering the standard of advice that our clients expect.

"This is the first in a series of strategic acquisitions we're pursuing to build national scale, enhance adviser capacity, and reinforce Shadforth's position in the high-net-worth advice space.

"We're seeing a growing demand for advice, driven by demographic shifts, economic complexity, and increasing intergenerational wealth planning. The addition of PMD strengthens our capabilities and supports our aspiration to be the last adviser any client ever needs."

PMD was assisted in the transaction by Tony Cimino from Endeavour Consulting Group.

-ENDS-

About Shadforth Financial Group

Shadforth Financial Group is a national financial advice business with a heritage dating back to 1924. Shadforth provides financial planning, investment management, superannuation and retirement solutions to individuals, families and businesses across Australia. Shadforth is part of Insignia Financial, one of Australia's largest wealth management groups. For more information, visit www.sfg.com.au.

Media Enquiries:

Natalie Hasapaki
Manager, Corporate Affairs
Insignia Financial
M: +61 404 921 041

E: natalie.hasapaki@insigniafinancial.com.au