MUTUAL TRUST

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MUTUAL TRUST FINALISES MERGER WITH MYER FAMILY COMPANY

Mutual Trust has confirmed ministerial approval to proceed with its merger with the Myer Family Company (MFCo), which was first announced in June this year. The combined business will trade as Mutual Trust, with Myer Family Investments its largest single shareholder.

Mutual Trust and MFCo have successfully managed the respective wealth of the Baillieu and Myer Families, as well as many other Australian families, across multiple generations.

Mutual Trust CEO Phil Harkness said the new business was a reflection of two firms with a similar history and exceptionally strong natural alignment.

“The merger between Mutual Trust and MFCo brings together the best of Australia’s two leading multi-family offices to create a full service tax, accounting, wealth management and intergenerational advisory firm that is without rival in this country,” he said.

“Together we can offer deeper expertise and insights, more personalised services and broader investment opportunities. We have created a standout leader in what is an increasingly complex industry and it is a privilege to be at the helm.”

Mutual Trust and MFCo both have a proud heritage of helping families, individuals, trusts and charitable organisations to manage their wealth and financial affairs across generations.

“The strong alignment of history and culture between the two firms made this merger a natural fit,” said Mr Harkness.

“We pride ourselves on a holistic approach to client services that goes far beyond simple wealth management activity. Increased scale will enable us to build upon that strength to create a unique set of diverse and tailored services for clients.”

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About Mutual Trust:

Mutual Trust is an integrated financial services firm for families, trustees, operating businesses, charitable organisations, indigenous communities and philanthropists. The firm provides a full suite of services across wealth management (including strategic asset allocation, investment advice, portfolio management and administration), tax, accounting and superannuation, philanthropy succession planning and intergenerational wealth transfer, asset protection and family office strategy, governance and operations.