PRUDENTIAL
ASSET MANAGEMENT

CAPABILITY STATEMENT

WHAT WE DO

FOR BUSINESS OWNERS / EXECUTIVE MANAGERS

- Business Mergers and Acquisitions Assessment and Planning
- Business Growth & Expansion Feasibility Assessment and Planning
- Business Performance Planning, Monitoring and Improvement
- Preparation and Planning for Business Sale and Exit and Ownership Transition / Succession
- Debt, Equity and Hybrid Capital Raising
- Corporate / Organizational Governance, Strategy and Risk Management

FAMILY GROUPS / PRIVATE INDIVIDUALS

- General Administration of Investment Portfolio, Commercial and Business Interests
- Risk Identification, Monitoring and Management
- Investment Opportunity Identification and Analysis
- Investment Performance Monitoring, Management and Improvement
- Family Group Governance, Strategy and Risk Management

WHY WE EXIST

We exist to help business owners, individuals and families protect, improve and grow their assets

HOW WE DO WHAT WE DO

We apply the following principles to provide the best solutions for clients:

TRUTH

We are curious and ask the right questions. We want to understand. We get to the bottom of the issue.

ACCURACY

We gather the right data. We engage with the right people. We understand things in detail.

TIME

With you we prioritise the best next steps. We set the right goals and expectations.

EXECUTIVE SUMMARY

After a successful 20 years as a corporate and commercial banker, funding the operations of small, medium & large business, high net worth individuals and family groups, I know what it takes to succeed.

Poor outcomes typically follow poor perspective, information and planning, and almost always, a poor outcome includes the wrong people, questionable motives and inaccurate analysis of data.

This doesn't have to be the case. With the right information, the right people and a template for good planning and governance, you can reduce the likelihood of a poor business, investment or family wealth creation outcome.

Peter Barden

MANAGING DIRECTOR

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TESTED & PROVEN

We have worked with many, diverse companies and families, including large global institutions, large corporations, high net worth private family businesses, and small to medium sized local business.

Our experience ranges from technical data gathering and analysis, data interpretation and presentation, and critical investment decision making, followed by performance monitoring and ongoing investment management.

The value of individual investments we have been accountable for varied between $1.0mio and $100.0mio, with total portfolios ranging between $100.0mio and $500.0mio. All of which required ongoing review, active assessment and risk vs return management.

The investments we have made varied across a range of industry and geographic sectors including manufacturing, professional services, industrial services, property development & investment, food & agricultural, retailing and wholesaling sectors.

It is this breadth and depth of commercial experience that ensures we have the skills required to ensure that we get the outcomes our clients need.

QUALIFICATIONS

FINANCIAL ANALYSIS CERTIFICATE University of Technology, Sydney

GRADUATE, COMPANY DIRECTORS COURSE Australian Institute of Company Directors (AICD)

GRADUATE DIPLOMA OF APPLIED FINANCE AND INVESTMENT KAPLAN

BACHELOR OF MANAGEMENT (BUSINESS) University of Sydney

FELLOW, FINSIA (FINANCIAL SERVICES INSTITUTE OF AUSTRALIA)

MEMBER, AUSTRALIAN INSTITUTE OF COMPANY DIRECTORS (ACID)