

HOBSON WEALTH

Unique focus on private wealth



⬆️ **LIFESTYLE ATTRACTIONS: DAVID LE BRETON AND FAMILY. PHOTO/DEAN PRESTON.**

BOUTIQUE INVESTMENT ADVISORY FIRM **HOBSON** Wealth Partners has extended its reach into the Bay of Plenty, recently adding Tauranga to its network of offices in Auckland, Wellington and Christchurch.

"Last year we met two great advisers whom we thought would immediately fit in to the Hobson Wealth culture. Our Tauranga manager David Le Breton (ex ASB Private Wealth) started late last year and Roger White (ex ANZ Private Bank) joined just a couple of weeks ago in early February," says Hobson Wealth's Managing Director, Warren Couillault.

"Working for an organisation majority-owned by its employees, and charting its own course was a huge draw card for me, aligning with my own values." - David Le Breton

"The Bay of Plenty is a good healthy market for us, and having these great advisers in the region will help us both service our existing clients better and grow our client base."

Hobson Wealth Partners has moved into The Vault, in Tauranga's downtown CBD - also the home of Quayside Holdings,

Enterprise Angels and Oriens Capital - which Couillault described as "a dream location" with other investment-focused companies. He also notes the firm's ability to move quickly on the decision to open in the Bay reflects a key aspect of the firm's unique approach.

Hobson Wealth Partners was set up nearly three years ago with Couillault leading a buy-in by the then management of Macquarie Group's NZ private wealth business. Macquarie has retained a small strategic stake in the business, which gives Hobson Wealth access to Macquarie's world-class securities research and global insights, enabling Hobson Wealth to deliver bespoke investment solutions to its clients.

Ownership allows fast responses

"We're quite unique," he says. "We own the business ourselves, all of the key people are hands-on shareholders and we are nimble and can react quickly to our clients requirements. We don't have any other business potentially undermining our focus."

David Le Breton has more than 20 years in banking and financial advisory roles in Australasia. He and his family moved from Auckland to Tauranga for the lifestyle in 2014 to join one of the big four banks, before moving to Hobson Wealth Partners late last year to open the new office.

"I was attracted to Hobson by the people in the business," he says. "When the opportunity to join the team came up, and in Tauranga, I jumped at it."

Roger White has had a 21-year career in banking, with the past five years as a senior private banker. He also owned and operated a successful retail business for 11 years. He's a Tauranga Coast Guard volunteer and seizes every opportunity to spend time fishing from his jet ski.

"Joining Hobson Wealth gave me an opportunity to join a leading private wealth advisory team with a focus on the client," he says.

"A big attraction was being able to offer my clients a tailored solution that is personalized to their circumstances."

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⬆️ **DREAM LOCATION IN BAY: ROGER WHITE AND DAVID LE BRETON. PHOTO/DEAN PRESTON.**