



# Harbourside Investment Committee

## The Investment Committee Role

The role of the committee is to ensure that the Investment Philosophy and investment process is adhered to and that the agreed investment strategies are complied within the management of the Portfolios.

## Investment Philosophy

Our investment strategy is unique in the market and looks at risk adjusted returns and utilising uncorrelated assets within portfolio management.

Our Investment Philosophy tends to withstand market volatility when clients can become vulnerable to the wild swings that can be seen in traditional equity markets.



### **ROBERT COYTE** CEO OF SHARTRU WEALTH MANAGEMENT ✓

Robert has over 30 years' experience in commercial banking, financial markets, stockbroking and financial planning.

In 2008, Rob successfully applied for his own AFSL. In 2012, he became the Chief Executive Officer of Shartru Wealth.

In addition to undertaking advisory duties Rob has sat on Investment Advisory Committees and Compliance Committees for AFS Licensees. Rob is well qualified and holds a Bachelor of Commerce and a Graduate Diploma in Applied Finance and Investment.

### **CLINT CHRISTOFF** SENIOR INVESTMENT AND MDA SPECIALIST ✓

Clint has worked in the finance industry for over 25 years, commencing as a stock broker in 2000 before joining the financial planning industry in 2006. Among other qualifications and certifications, Clint holds a Bachelor of Commerce, Advanced Diploma of Financial Services and is a Certified Financial Strategist (CFS).

Clint plays a significant role as the Senior Investment and MDA Specialist within Shartru Investment Management (SIMA). Clint is highly regarded for his complex analytical skills when supporting and assisting Financial Planners engage with their clients to achieve results.

### **CHRIS LIOUTAS** INVESTMENT COMMITTEE MEMBER (CHAIRMAN) ✓

Chris has been in the financial services industry for 20 years and is the owner and director of Genium Investment Partners, an investment consulting & research business set up in 2013 to provide services to financial advisers and licensees.

Chris previously worked for a Big 4 bank where he provided a range of similar services to financial advisers and licensees, as well as internal stakeholders.

His research has historically covered managed funds, listed securities (shares, ETFs, Hybrids), economics, geopolitics, and asset allocation.

He holds a Bachelor of Applied Finance and a Bachelor of Commerce with a major in Professional Accounting, and a Master of Applied Finance, all from Macquarie University.

