AMA | Austen Morris Associates

Invested Together, Always

MARIO MITOV

Consultant

"Professionalism is not about adherence to the policies of a bureaucracy. Professionalism is about having integrity, honesty, and sincere regard for the personhood of the customer, in the context of always doing what is best for the business. Those two things do not need to conflict."

- Eric Lippert

PROFESSIONAL ACHIEVEMENTS

- 3 Academic Publications
- Awarded a grant by the EU Commission
- Awarded a grant by the Federal Republic of Germany

PERSONAL ACHIEVEMENTS

- Masters in Economics and Finance
- Enrolled in a Master's degree 8 months before Graduating from his Bachelor's

As a financial consultant, Mario helps his clients to achieve their financial goals by carefully considering their current situation, their needs and desires, and works with them to tailor the most appropriate solution. As the old saying goes, "Choose a job you love, and you will never have to work a day in your life".

Mario believes that it is this love for his job, his enthusiasm and professionalism that help his clients to bridge the gap between hypothetical and vague goals and real-life results. In doing so, while providing a continued and seamless service, Mario is able to achieve the ultimate goal of the financial consultant's job - building long-lasting and sustainable relationships that thrive regardless of where in the world opportunity takes their clients, so that they can remain on track to achieving their goals.

It is this longevity and sustainability that inspires our clients to put their trust in us and to refer others who could benefit from a close working relationship with a financial adviser to us. Together with Senior Partner, Jon Roland, Mario oversees $40 million in client investments and helps clients with a wide variety of topics such as retirement planning, children's education planning, portfolio management, currency trading, real estate, and savings and investing.

Mario is passionate about travelling, he has lived in 5 countries and has visited over 30, with more on the list. He loves surfing and is well trained in martial arts (Aikido, Judo, and Muay Thai). He is also a keen reader of philosophy, science, and history.

AREAS OF SPECIALIST FOCUS

- Strong focus on Client Servicing
- Global Portfolio Management
- Retirement Planning
- Education Savings
- Portfolio Management Transfers
- International Property Investing
- Life Insurance

PRIVATE WEALTH MANAGEMENT

- Retirement Modelling & Planning
- Estate Planning & Fiduciary Review
- Quantitative Portfolio & Fund Analytics
- International Tertiary Educatioan Planning
- Direct International Property Investments
- UK & US Pension Planning & Transfers
- Portfolio Gearing & Sophisticated Investments
- Mutual Funds & Exchange Traded Funds
- Direct Share Investments
- Investment Bank Products
- Employee Benefit Schemes
- Business Assurance
- Health Care