AMA | Austen Morris Associates

Invested Together, Always

NICK PITRO
Partner

"Motivated by the fear of being average."

- Anonymous

PROFESSIONAL ACHIEVEMENTS

- Bachelor of Commerce Degree
- Higher Certification in Wealth Management - Level 5
- RE5 Compliant
- FICA Awareness Certification
- PSS Course 2005 (Professional Selling Skills)
- Associate Partner at Austen Morris Associates
- Global Consultant managing clients across 5 continents

PERSONAL ACHIEVEMENTS

- At the age of 27 Head of Sales for a 15 man strong professional sales team
- Co-chair of the Leopard Identification Project
- Regional Head for one of South Africa's top global advisory firms
- Avid amateur wildlife photographer
- Made Associate Partner at Austen Morris Associates in 2020
- Proud husband and father of two

Nick has an extensive professional consulting career, spanning more than two decades. His education background includes a Bachelor of Commerce in Marketing, necessary financial regulatory exams including RE5 as well as NQF to Level 5 and is also in the process of completing his Chartered Financial Planning degree.

He lives by the motto of "Being motivated by the fear of being average" and strives to filter this into all areas of his life, including work, family, client interactions and personal passions. Values that are at his core include mutual respect, integrity and "treating every day as if it was his last".

Although born in South Africa, Nick now manages clients for Austen Morris Associates across 5 continents. He enjoys the diversity of people and different cultures whilst assisting clients to reach personal financial and investment goals.

As a key member of the Austen Morris Associates global team, Nick understands that inherently people work with people they trust. Relationship building is, therefore, key to his ethos and success.

Nick's responsibility to the group also includes global sales training, ensuring all Austen Morris Associates employees in a sales or client facing function portray the same level of expertise and professionalism synonymous with our brand, with a heritage of over 27 years (established 1994)."

Nick's personal life is kept occupied as an avid wildlife photographer, a sports fan, time spent with family and being a devoted husband and father.

AREAS OF SPECIALIST FOCUS

- Investment Structuring for Entrepreneurs
- Global Portfolio Structuring and Management
- Discretionary Trust Setup and Management
- Strong relationship focus

PRIVATE WEALTH MANAGEMENT

- Retirement Modelling & Planning
- Estate Planning & Fiduciary Review
- Quantitative Portfolio & Fund Analytics
- International Tertiary Education 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