



JON HOLAND

Senior Partner

“If you don't like something, change it. If you can't change it, change the way you think about it.”

- Mary Engelbreit

PROFESSIONAL ACHIEVEMENTS

- | Achieved Partner status with AMA in 4 years, Senior Partner in 6 years.
- | Business Development Manager in the Shanghai office since 2010, responsible for the management & development of new consultants joining the business.
- | Head of the Business Ethics Committee since 2011.
- | 3rd largest shareholder in a global financial services firm at age 35.
- | A focus on client servicing means that almost 80% of new business is done on a referral basis.
- | Registered Investment Advisor in the US (US Regulatory status - Series 65)

PERSONAL ACHIEVEMENTS

- | Graduated Phi Beta Kappa in the top 10% from The Johns Hopkins University with a degree in International Relations.
- | Master's Degree in International Economics with a focus on East Asia from Columbia University - consistently ranked in the top 10 Universities in the US
- | Fluent in 4 languages - English, Norwegian, Chinese and French.

Jon became a Senior Partner of Austen Morris Associates in February of 2014 after having worked his way through the company ranks. He currently advises many high net-worth clients in China, Vietnam, Thailand, the Philippines, and other parts of the world on their financial planning needs.

Providing clients with tailored solutions and a first-class service, it's no surprise that every year at least 80% of Jon's new clients are referred by existing clients.

Jon offers wide-ranging financial planning solutions to clients who work for amongst others KMPG, Ernst & Young, PWC, CBRE, AT Kearney, Exxon Mobil, Astra Zeneca, and Pfizer.

Jon keeps his clients abreast of changes in the markets and recommends changes that enhance their investment returns. Born and raised in Norway, Jon moved to the U.S. at the age of 14. He has been based in China since 2004 and plans to stay indefinitely.

AREAS OF SPECIALIST FOCUS

- | Sophisticated solutions for professional investors
- | Global Portfolio Structuring and Management
- | Strong focus on Client Servicing
- | 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 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