



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 Holand is a Senior Partner at Austen Morris Associates, having earned his partnership in 2011 after progressing through the firm based on consistent performance, client advocacy, and long-term value creation. With more than two decades of international exposure and nearly two decades based in Asia, Jon advises high-net-worth individuals across China, Vietnam, Thailand, the Philippines, and other global markets.

Jon is known for his clear, structured, and highly personalised approach to financial planning. He works closely with clients to understand their broader life goals before designing tailored strategies that prioritise security, long-term growth, and resilience through market cycles. This client-first philosophy has resulted in a strong referral-driven practice, with the majority of Jon’s new clients introduced through existing client relationships year after year. His client base includes senior professionals and executives working for multinational organisations such as KPMG, Ernst & Young, PwC, CBRE, AT Kearney, ExxonMobil, AstraZeneca, and Pfizer. Jon regularly supports expatriates and internationally mobile clients, helping them navigate complex cross-border financial considerations with confidence and clarity.

Clients consistently describe Jon as professional, patient, and trustworthy, highlighting his ability to explain financial concepts at the right level, remain calm during market volatility, and maintain close, ongoing communication. He is valued not only for his technical expertise, but for his genuine commitment to acting in his clients’ best interests and building long-term partnerships grounded in trust.

Born and raised in Norway, Jon moved to the United States at the age of 14 and has been based in China since 2004. With deep roots in the region and a truly international perspective, he continues to focus on helping clients build, protect, and grow their wealth with confidence - today and for the future.

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

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REFERENCES AND TESTIMONIALS

Austen Morris Associates - Beating market performance

"I am pleased to provide some feedback and hope this will contribute to the development of his clients' portfolio. We have been working as customers with Jon Roland for the last five years and have been pleased by his professionalism as well as the results of the work. Ultimately our financial assets he is taking care of have developed very well, and Jon's advice allowed and enabled us to perform better than the average market. We have regular contact, receive brief updates and are happy that Jon is not just a service provider, but a caring friend, who has insight in our personal goals and works in the best interests of his customers. Therefore, I recommend Jon to anyone interested to look after their financial future and engaged in financial planning to achieve set goals. Sincerely."

Jiirgen Laske - Entrepreneur, computer engineer

Austen Morris Associates - A refreshing approach which is easy to relate to

"I recently attended a financial planning session with AMA consultant Jon Holland as part of an event with the American Chamber of Commerce in Shanghai. Jon's insight was beneficial and allowed me to take an honest look at my finances and align my investment portfolio with my goals for the future. The scenarios he presented were realistic, and he shared from his personal experience, which was refreshing and easy to relate to. I plan to meet with him on a one on one basis to see how I can further optimize my investments."

Johanna Hoopes - Dragon Group Asia

Austen Morris Associates- Professionalism expertise

"I have been working with Jon for a while and can only commend him on his professionalism and his expertise in his work. He has shown to be very knowledgeable and possess great intuition on both customer service and financials. Highly recommendable".

Hildegard Anzenberger - Hotel manager, The Langham, Shenzhen

Austen Morris Associates - Professional and Trustworthy

"Among the several ones I've encountered along these years in China, Jon is the most professional and trustable financial advisor. He is very professional and looks at 360 degrees about your needs and economic expectation by proposing the most secure financial plan without creating false hope and avoiding financial risk. I have no doubts about recommending Jon Roland to anyone who wants to have a very great and professional financial advisor".

Giuseppe Di Bella - Central Planning & Back End Operations at ST Microelectronics

Austen Morris Associates- Satisfying results

"Jon has been providing me with financial advice for the last three years, with very satisfying results. In addition to his undeniable professionalism and knowledge of the market, I appreciate his straight-forward approach, very clear and realistic, and how he swiftly understands needs and suggests concise but attractive ad-hoc choices. In the case of Jon, professional means not only diligence and responsibility but also engagement and personalized advice."

Alberto Estevez Allegue - Chief Financial Officer, Asia Pacific at MAPFRE

Austen Morris Associates- Diligent & professional

"I have been a client of Jon's for over a year, and in this time, I have established he is competent in his field, attentive to his clients, understanding and a diligent professional. I had had the chance to work with financial advisors before and checked the market thoroughly before deciding to work with him. I have appreciated his advice, compassionate but realistic approach to guidance on economic affairs and his sound management of our finances in a time of relative turmoil in the markets. Can't recommend his work enough".

Kostas Dissios - Managing Director at MODEU

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REFERENCES AND TESTIMONIALS

Late in 2021, with the help of Jon I started my investment.

During the entire process Jon was clear and straight forward, explaining each step of the process and making sure that I understood everything. He and his team are helpful and will give you personalised suggestions for investments, catering to whatever it is that you have planned for the future. Truly worth your while to have a chat with Jon.

Jaco Steyn – Teacher at Dipont Education, Wuxi

From our very first talk, it was clear that everything Jon does is driven by genuine care for his clients and conscientiousness towards their needs.

He has a rare ability to listen and take careful note of every detail, so that the advice he gives is fully personalised. Hence, during our initial talk and in his initial recommendation report, the conclusions he drew and suggestions he made matched what I had already begun to see as the best options for my situation. He will always get feedback and opinions from you at every possible stage, before giving advice. He is an excellent communicator and can give his advice with a ranging level of detail and technicality based on his client's knowledge, understanding and interest. As a final point, Jon is down to earth and easy to speak to. It is easy to see him as a friend as well as a financial advisor. I fully trust Jon. As a very independent person, I would normally have been sceptical about allowing someone to help me manage finances. I couldn't recommend Jon enough.

Joel Pope – Teacher at EF English First, Guizhou

Jon is extremely professional. He is knowledgeable and assuring when it comes to decisions that we have made. He takes so much time to ensure that the client is well informed and at ease. His guidance and constant support is above and beyond. It is without a doubt that I would recommend Jon to anyone that I know!

Tessa Mallett – Course Developer at Canglory Education, Beijing

Jon, has been helping me this past year get to grips with my finances and understand more about the world of investing.

After meeting Jon, I felt at ease due to his nature and professional manner. Jon is thorough in ensuring you understand and get the information specific to you and is always available to answer any questions and go the extra mile to ensure the process goes smoothly. I would happily recommend Jon's services to those who are serious about investing and at any level.

Danielle Cook – SEN Lead/Class teacher at Huili Hangzhou

I was thinking of saving and investing money for a while but never did anything about it. Jon contacted me through LinkedIn and it was the best thing that could have happened to me. He was very thorough with his explanation of everything which was great as I don't have a prior knowledge of investing. Since meeting him it has been a very smooth transition through all the steps to get me started on my investment journey. Jon is very professional and regularly keeps in contact. I recommend Jon to anyone who wants to invest their money as he is a very reliable and knowledgeable financial advisor.

Scott Roberts – ELA Teacher at Shanghai Pinghe Bilingual School

Jon is very professional, patient and easy to work with.

He guided us to set up an investment plan. He explained all the details to us so we could understand what we are doing and where we need to be going. We were very hesitant at first but now we will not look back. I will confidently recommend Jon wholeheartedly.

Carla de Wet Boshoff – Art/ESL Teacher, Beijing

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REFERENCES AND TESTIMONIALS

I was very hesitant and scared to invest or even think about it. After meeting Jon I raised my concerns and he guided me to understand what would be best for me as a teacher. It took me time to get to place where I could invest and guess who was there helping me? Jon Holand. I would say his approach and methodology is exactly what I needed a breath of fresh air compared to other people who hunt you down. He is always willing to answer questions. If you are looking for someone who you can really trust. I trust this man.

Brian Sokhela – English First, Fuzhou

When you decide to take on start your financial journey (especially in China) I cannot think of someone more suitable to walk you through it. Jon has been so good at explaining in a way that I can understand, he is open-minded and understands what my big picture is.

Xolisile Sithole – Kindergarten Teacher at Chengdu Kindergarten