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Boost to Equity Trustees Business Development team with two new appointments

Australia's leading trustee company, Equity Trustees, has made two new appointments to its Trustee and Wealth Services (TWS) Business Development team.

Based in Sydney, Tomas Klein, formerly an executive at NAB, is the new General Manager, Business Development in the TWS Private Client division. He is joined by Xavier Craven in the role of Business Development Manager, also in the Sydney office.

"With well-developed understandings of the key aspects of our highly specialised business, including investments, estate planning and philanthropy, and experience in working with clients with a very similar profile to ours, Tomas and Xavier are excellent additions to the team in TWS responsible for key accounts and clients," said Ian Westley, Executive General Manager, TWS Private Clients.

"Their extensive expertise will support the continued expansion of our national business, with a focus on strengthening and growing our business partnerships in the Sydney market.

"They each come from extensive financial services backgrounds, with formal qualifications in business and finance, and they understand the unique regulatory environment of a trustee company and the importance of our role in managing and protecting the wealth of the individuals, families and organisations we serve," he said.

Tomas Klein's experience includes 15 years at NAB, holding leadership roles in business markets and private client segments before moving into roles with regional leadership responsibilities. As General Manager of Business Development in TWS at Equity Trustees, he will lead a small national team and develop strategies to continue to grow the diverse portfolio of private client services and products.

Xavier Craven was previously a partner at Primestock Securities. His experience includes senior adviser positions at Perpetual Private Wealth, Affinity Wealth Services and Australian Financial Counsellors, where he was also a company director.

"We congratulate Tomas and Xavier on their appointments and welcome them to Equity Trustees," concluded Mr Westley.

MEDIA INQUIRIES

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Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers.

Equity Trustees is the brand name of EQT Holdings Limited (ABN 22 607 797 615) and its subsidiary companies, publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane, Perth, New York, London and Dublin.