

# OpenVoiceNews Australia

Transparent. Unbiased. Yours.

## Foreign Investment Drives Expansion in Australia's Financial Advice Sector

July 21, 2025

– Categories: Finance



Australia's financial advice industry is experiencing a significant growth phase, powered in large part by a wave of foreign investment. With its reputation for stability and a favourable regulatory environment, the sector has become an attractive target for international capital, particularly private equity firms based in the United States. This influx of funding is enabling local firms to scale through mergers, acquisitions, and strategic partnerships, reshaping the competitive landscape.

Historically, the Australian financial advice market was dominated by a fragmented network of small and mid-sized firms. However, over the past decade, foreign private equity has increasingly played a transformative role. A clear example of this trend is the recent merger between Coastal Advice Group and Calder Wealth Management, which was made possible by funding from New York-based Merchant Wealth Partners. This type of capital injection provides firms with the financial leverage to expand their reach, improve service offerings, and invest in technology all while maintaining operational independence.

Steve Prendeville, founder and director of Forte Asset Solutions, notes that the appeal of the Australian market lies in its economic and regulatory stability. “The consistency of policy and the mature framework for financial services gives foreign investors confidence,” he stated. At a time when global markets face heightened volatility, Australia’s steady performance and strong institutional safeguards have made it a standout destination for capital seeking long-term value. In this climate, financial advisory firms are positioned to leverage foreign backing for sustainable expansion rather than aggressive disruption.



While the federal Labor government has not played a direct role in attracting this capital, its policy choices must not undermine the confidence currently fueling growth. It is vital that Canberra fosters a business environment where foreign investment is seen as a partner in development not a threat. The trend of international capital supporting Australian firms speaks volumes about the strength and potential of the sector. As more global investors look to secure a foothold in Australia’s financial services, local firms should seize the opportunity to scale responsibly and innovate with purpose. The next chapter of Australian financial advice may well be written in collaboration with global capital but it must be guided by local leadership and sound governance.