



EVIDENCE BASED INVESTING



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THE CAPITAL COMPANY  
HONG KONG LIMITED

is authorized and regulated by the Securities and Futures Commission for RA4 and RA9 CE. No. BIH055 & Adviser ALN132

Utilizing "Evidence Based Investing" as our core investment methodology we seek investment returns in lockstep with clients' portfolio mandates while mitigating fee, cash and tax drag. Managing money is a science, not an art.

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TO SEE TODD

## TODD PALLETT

### Founding Partner and Private Client Adviser

Todd hails from Perth, Western Australia where he attended Aquinas All Boys College. Completing his degree he graduated from Curtin University with a Bachelor of Commerce, property major.

His first business venture during university was a martial arts school franchise he later sold to move into financial planning full time, but not before he competed in taekwondo and became Australian Heavyweight Champion. Representing Australia at the 1996 World Open Taekwondo Championships he won a bronze medal and was a finalist in Western Australia's Sports Star of the Year Awards.

Todd is a financial adviser and estate planner serving clients since 1996 (21 years) and expatriates living in Asia since 2002 (15 years).

A former "Financial Adviser of the Year" in 1997 for AMP in Sydney, Australia, Todd was headhunted to HSBC (Sydney) in 1999 to set up their national financial planning business that is present today.

In 2002 Todd moved to Hong Kong to join a large offshore financial adviser group and in 2009 became a partner in his own financial planning firm.

A career that's spans managing capital through the 1997 Asian Crisis, 2000-02 Dot-Com Bubble and the 2007-09 Global Financial Crisis as a business owner, Todd has lived and worked through many boom-bust periods of financial management. This experience led him to the methodology of "Evidence Based Investing" today and becoming a founding partner of The Capital Company in 2017.

Todd is dual licensed in two countries with the Securities and Futures Commission (SFC) and the Confederation of Insurance Brokers (CIB) in Hong Kong. As well as the Australian Securities and Investment Commission (ASIC) with his Australian company Symmetry Group Pty Ltd ([www.symmetrygroup.com.au](http://www.symmetrygroup.com.au)) with offices in Perth and Sydney.

As the Chief Executive of The Protection Company Hong Kong Limited, Todd provides insurance programs and advance estate planning strategies to expats with cross-border challenges.

Todd provides a comprehensive solution for expat clients including cross-border tax planning, portfolio management, direct property investment, estate planning and insurance programs. Advising Americans, Australians, British, Canadians, Europeans, New Zealanders, and South Africans, Todd structures, invests and protects the wealth of clients and intergenerational family.

With two self-published books "The Wealthy Aussie Expat" and "Outsourcing – Your Cloud Office in the Philippines" along with his "Rich Pilot" newsletter, Todd has more books, newsletters, webinars and courses in development for 2017 and beyond.

Todd lives in Pokfulam, Hong Kong with his wife and two children and is a permanent resident.

The financial planning process starts with a complimentary initial meeting we call the *Discovery Session*. Here we discuss your needs, goals and financial circumstances to determine how we may assist and how we charge. We are a fee for service firm and explain all our fees in advance. Ask for a copy of **The Capital Company Creed** explaining our fee offering and client experience.

