

TESTIMONIAL



“Dear Hugh.

Having supervised your Certified Investment Management Analyst study through 30 weeks of 2022 and then watched you prepare for, sit and pass the global exam in 2023, I’m pleased to provide you with the following set of observations and reference. I’d welcome talking with anyone to validate and confirm my views expressed here.

Hugh Robertson, Certified Investment Management Analyst, Fellow CIMA Society Asia Pacific – Managing Director / Senior Financial Adviser, Centaur Financial Services.

You just need to look at a picture of Hugh Robertson’s face, with its radiant smile, and you can almost literally see his passion for life and for others. Hugh stands out as a man on a mission, whether interacting with his family, colleagues or clients in his home base of the Gold Coast or in national or international company. During 2022, I was privileged to see Hugh’s face for two hours a week for weeks on end, as he interacted with fellow professionals from across Australia and New Zealand. Since then, my positive impression of and experience with Hugh has only been reinforced.

Hugh Roberston is seriously smart in an IQ sort of a way, but also and as importantly in an EQ sort of a way. The financial advice profession is fortunate to have Hugh as one of its practitioners and protagonists. He is determined to be the best in this chosen profession – and so notwithstanding his existing qualifications he has an ongoing thirst for continuing to grow his knowledge and skill through rigorous and intensive continuing education. Importantly though, Hugh also openly and clearly shows his determination to be the best through a demonstrated commitment as an active husband and partner to his wife, as a father to four young and energetic children, as the head of a successful financial advisory practice, as the leader of a team of business colleagues, and as a practicing financial adviser. On every measure, Hugh is committed to best practice.

“With this context, it is therefore unsurprising that in late 2021, Hugh Robertson applied for a place in the global Certified Investment Management Analyst (CIMA) study and certification program. The CIMA program is world best practice – as continuously assessed against International Standards (ISO) – in all aspects of the theory and practice of multi-asset, multi-manager investment portfolio construction. After acceptance into the CIMA program, and as one of just 25 in the Masters level class from across the investments and wealth markets of the Asia Pacific, Hugh started with high expectations and enthusiasm. A few weeks into the 30 week, 300 hour foundation education course, Hugh stated in the weekly online tutorial “this is exactly what I was expecting, and what I wanted to improve my competence in understanding investment portfolio design for my clients and my team”. Hugh’s enthusiasm didn’t falter throughout. He stuck with the intense program – notwithstanding that it followed COVID challenges and regulatory requirements for study – with diligent commitment and a successful credit pass in the four hour exam.

His enthusiasm was infectious with the other candidates. The credit pass entitled Hugh to prepare for and sit the global CIMA certification Exam. Hugh passed the final five hour exam, and joined an elite number of CIMA certificants in Australia and around the world following extensive subsequent reference validation. Hugh is now a Fellow CIMA Society Asia Pacific, and has continued with the additional specialist continuing education requirements necessary to retain the certification. He has also continued to engage and interact with me, as one of the Australian alumni.

I commend Hugh Robertson to you as a person who will add value to whatever and whoever he works on and with. We are proud to have Hugh Roberston as a Certified Investment Management Analyst and Fellow CIMA Society Asia Pacific.”

Graham Rich

Managing Partner & Dean

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