salita

PORTFOLIO SERVICES

At Salita, we deliver quality portfolio construction services designed to work seamlessly whilst delivering lasting value.

Established Expertise

Salita Portfolio Services, formerly known as Personal Financial Services Investment Management, was founded in 2016. With over eight years of experience managing multi-asset models and portfolios in Australia, Salita has built a strong track record of delivering consistent, high-quality investment outcomes.

Our team brings an average of over 25 years' experience in the industry, backed by a rigorous risk governance framework and an Investment Committee chaired independently. This depth of expertise ensures our solutions are well-researched, well-governed, and built to deliver long-term value.

Who We Are

Salita was established with a clear purpose: to deliver high-quality portfolio management and investment solutions with clarity and confidence. We understand the complexities of navigating financial markets and are committed to helping our clients achieve strong, sustainable outcomes.

As part of the Entireti Group, Salita combines the agility and personal focus of a specialist portfolio partner with the scale, governance, and research depth of an institutional investment organisation.

Partnerships that enhance every portfolio

Salita is part of a network that supports approximately 1,600 professionals across Australia. We also work in partnership with leading research providers and global investment managers through Lonsec Investment Solutions, alongside respected names such as BlackRock and Franklin Templeton. These strategic relationships enable us to offer world-class insights, robust investment strategies, and meaningful value to those we serve.

Learn more about our expert team at salitaportfolioservices.com.au

What We Offer

Salita Portfolio Services offers a comprehensive support system that goes beyond investment management. We deliver strategic guidance, operational efficiency, and a platform tailored to the evolving needs of advice practices and their clients.

Insights & Reporting Solutions

We provide timely insights, practical tools, and comprehensive reporting to support confident, informed decision-making. Our suite of resources—including monthly and quarterly reports, and strategy fact sheets are designed to simplify investment communication and enhance engagement.

Direct Access to Experts

Clients and partners benefit from hands-on consulting and support from our experienced team, including direct access to our Chief Investment Officer and Portfolio Managers. We offer portfolio solutions guidance to help achieve strong, consistent outcomes.

Portfolio Construction

Salita offers a diverse range of Managed Account solutions suitable for individuals at every life stage. Our actively managed Growth Series portfolios aim to outperform benchmarks and meet CPI+ objectives across various risk profiles. These portfolios are designed to enhance returns or manage risk by responding to cyclical trends rather than relying solely on static long-term assumptions.

Tailored Investment Solutions

In addition to ready-made solutions available on major platforms, Salita partners with organisations to develop custom investment strategies. We can act as the Investment Manager to create bespoke Separately Managed Accounts (SMAs) or Managed Discretionary Accounts (MDAs) tailored to specific needs.

Bespoke Consulting Services

Our team of investment specialists provides consulting across portfolio construction, investment governance, and investment committee participation. We also contribute to strategic discussions and present at events to support broader engagement and understanding.

Our Investment Values

- Growing and preserving capital
- An intelligent approach to asset allocation
- Managing turnover
- Active and passive investment strategies
- A focus on fees
- Diversification

Our Experienced Team

At Salita, we provide portfolio management expertise together with deep industry insight, shaped by decades of hands-on experience.

Every member of our team has worked within financial services networks, giving us a practical understanding of the challenges and opportunities faced across the sector.

With an average of over 25 years in the industry, our team combines seasoned judgment with a commitment to delivering well-researched, high-quality investment solutions.

With $5 billion in assets under management, the team provides strategic portfolio solutions through managed accounts and tailored investment advisory services.

Executive Management

John Carnevale

EGM, Research and Investment Services

MFinLaw, GDipAppFinInv, BCom, DipFP, DipSM

John has over 35 years of experience across financial services, wealth management, and professional services, with senior leadership roles at organisations including KPMG, Colonial First State, Commonwealth Bank, Australian Unity, Challenger, and AMP. He joined Entireti in 2023 to lead investment research, enhance portfolio management capabilities, and strengthen managed account services. John has chaired multiple investment committees and holds postgraduate qualifications in law, finance, superannuation, and financial planning.

Portfolio Management

Aman Ramrakha

Chief Investment Officer

BCom, CIMA, GDipAppFinInv, DipFinP

Aman brings over 30 years of experience in financial services across technical, consulting, and research roles. Prior to joining Entireti in 2025, he was Executive Director of Research at Rainmaker Information, and held senior positions at Morningstar and Commonwealth Bank, overseeing investment research and consulting for multi-billion-dollar portfolios. His career also includes roles at BT Financial Group, Colonial First State, KPMG, and Commonwealth Private. Aman holds multiple finance qualifications and is a Certified Investment Management Consultant.

Tim Schroeders

Senior Portfolio Manager

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Tim has over 30 years of experience in investment markets and joined Salita in 2017. He leads research, analysis, and portfolio construction, with oversight of fund and direct investment monitoring, macroeconomic analysis, and SMA governance. His previous roles include Senior Fund Manager at Pengana and leadership positions at IWL Limited and County Investment Management. Tim's expertise spans global resources, thematic investing, and portfolio governance. He is an Affiliate of the Securities Institute of Australia and a member of the Salita Investment Forum.

Sean Webster

Head of Research Services & Senior Portfolio Manager

MArts, CFA, BCom

Sean has nearly 30 years of experience in investment research and portfolio management. He joined Entireti in 2024 after nine years at AMP Investments, where he led asset allocation and retirement strategy. His career includes senior roles at Australian Fund Monitors, Byron Capital, Berkley Group, and Centuria Capital, with expertise across equities, fixed income, property, alternatives, and macro strategy. Sean holds a Master of Arts from Clark University and is a CFA Charterholder.

Portfolio Management cont.

Cindy Zhao

Investment Governance Manager

MCom, MArts, BBA, AdvDipFS, CertGovRM, CertMLGI

Cindy has nearly 20 years of experience in financial planning, governance, and compliance, with roles at BT Financial Planning, Westpac, AMP, and now Entireti. She oversees due diligence and monitoring of SMAs, MDAs, and insurance solutions across multiple licensees. Cindy holds a Bachelor of Business Administration, two Master's degrees, and advanced qualifications in financial services and governance. She plays a key role in maintaining high standards of compliance and supporting informed investment decision-making.

Nigel Douglas

Independent Investment Committee Chairperson

MAppFin, MCom and MA

Nigel joined Salita in 2025 as Independent Chair of the Investment Committee for Managed Accounts and SMAs. With over 30 years of experience, he has held senior roles at Merrill Lynch, Van Eyk, Perpetual, and Douglas Funds Consulting. His expertise spans macroeconomics, asset allocation, and investment governance. Nigel holds a Master of Applied Finance from Macquarie University and a Master of Commerce from the University of Sydney.

Investment Research

Julia Tao

Senior Investment Research Analyst

CFA, MCom

Julia has over 18 years' experience in financial services, specialising in investment research, governance, and compliance. Since joining Entireti in 2019, she has led due diligence, portfolio research, and adviser support across SMAs and MDA governance, while contributing to major infrastructure and policy projects.

Calvin Yap

Senior Investment Research Analyst

CFA, MFin, BCom

Calvin joined Entireti in 2021, bringing strong expertise in market research and investment analysis from his previous role at Investment Trends. At Salita, he contributes to research, asset allocation, product due diligence, and portfolio monitoring. He has completed CFA Level III and holds a Master of Finance from UNSW. Calvin's analytical approach supports robust, evidence-based portfolio decisions.

Portfolio Solutions

Sarah McCarthy

Head of Portfolio Solutions

CFP, BIArch, AdvDipFS, DipMB

Sarah leads Salita's Portfolio Solutions team, delivering tailored consulting and execution services. With over 25 years of experience across advice, investment management, governance, and licensee leadership, she brings both practitioner and strategic expertise. Prior to joining Entireti, she held senior roles at AMP Group and worked as a financial planner in Adelaide. Sarah is a CFP® professional with qualifications in financial planning and mortgage broking.

Natara Evans

Senior Manager, Portfolio Solutions

BCom

Natara has over 20 years of experience in financial services, with expertise in portfolio consulting, distribution strategy, and managed account implementation. She has held national roles at Colonial First State, BT, and within licensee environments. Natara specialises in designing tailored investment solutions aligned to client goals, combining strategic insight with a collaborative approach to deliver scalable outcomes.

Start a conversation with Salita.

Partner with a portfolio services team that truly understands the adviser ecosystem and discover a portfolio partner — shaped for your clients:

web
salitaportfolioservices.com.au

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support@salitaportfolioservices.com.au

To find out more about the Salita portfolios or to arrange a discussion for your practice, please contact:

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