



## **Redefining Investment Analysis and Precise Wealth Creation: TWC Investment Management Launches**

*Boutique investment manager launches, led by CIO John Birkhold and CEO  
Owen Hereford*

**Melbourne, 24 September 2024** - Today, TWC Investment Management (TWC), a boutique investment manager has launched in the Australian market and will be led by Chief Investment Officer (CIO) and former Credit Suisse Managing Director John Birkhold, and Chief Executive Officer (CEO) Owen Hereford.

Birkhold was previously Managing Director at Credit Suisse HOLT in London where he spearheaded a cashflow-based and industrial life-cycle investment framework that transformed investment analysis globally.

TWC will initially offer three funds to wholesale and institutional clients based on its proprietary investment framework.

The framework is a departure from conventional accounting-based market norms and is underpinned by a Real Return on Investment (RROI) measure of corporate performance with an embedded expectations valuation approach grounded in an industrial life cycle framework.

John Birkhold, CIO explains, "The goal is to break away from conventional metrics, like EPS growth and Price-to-Earnings ratios, and instead focus on economic measures of corporate performance and embedded expectations in order to create, not diminish, the wealth of our clients."

"Our proprietary framework, which has been refined over the past 30 years, is adept at identifying listed company wealth creators, run by exceptional management teams, across the entire industrial lifecycle spectrum."

TWC's investors will gain access to a range of strategies including Global and Australian focused Wealth Creator funds.



Owen Hereford, CEO, TWC said, "At TWC, we are focused on setting a new standard in Australian funds management through transparency and clarity of purpose."

"We have the opportunity to generate lasting value for our clients by sharing key insights so that they can navigate financial markets and allocate capital in a more rational manner in order to achieve their long-term financial objectives."

Hereford and Birkhold are joined by an experienced team of Founding Partners and industry veterans, including Neil Carter, Cameron Sinclair, Amy Reed and Angelique Tan ([biographies available here](#)). The group has extensive experience covering investment, sales and marketing, compliance and operations.

"Wealth generation that is rooted in a strategic-based framework that has been designed with clarity, precision and knowledge will empower our investors to deploy capital with the confidence of context," Hereford concluded.

**ENDS**

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### **About TWC Invest**

TWC Invest is an Australian boutique investment manager with operations in both Melbourne and Sydney. The Company was formally launched by the Founding Partners, including John Birkhold and Owen Hereford, in 2024.

Using its proprietary investment framework, TWC strategically empowers its investors to deploy capital with the confidence of context. Its precise insights uniquely evaluate publicly listed companies and management teams through an industrial lifecycle lens, anticipating prospective economic return generation in line with consistent corporate performance drivers.

TWC is open to Australian wholesale investors and provides access to a range of strategies including its Global Wealth Creators, Select Global Wealth Creators and Emerging Wealth Creators funds.