



## Press Release

### **US-backed capital partner, Merchant Wealth Partners makes strategic investment in Brisbane advice group**

**29 January, 2026**

US-backed capital partner, Merchant Wealth Partners has secured a strategic minority investment in Brisbane-based multidisciplinary financial services firm, Infinity Financial Consultants as it positions itself to play a more active role in the consolidation of Australia's wealth management, accounting and lending sectors.

Merchant Wealth Partners is the local Australian arm of New York-based Merchant Investment Management, a global investor known for backing founder-led wealth and advisory firms pursuing long-term acquisition strategies.

The deal, which sees Merchant Wealth Partners take a non-controlling stake, provides Infinity Financial Consultants with access to permanent capital and transaction expertise as it looks to scale beyond its Queensland footprint through targeted mergers and acquisitions.

Infinity Financial Consultants operates across Brisbane, Cleveland and the Gold Coast, offering financial planning, accounting, lending and personal risk advice under a single multidisciplinary model. Like many mid-sized advice groups, it has benefited from industry consolidation pressures that are reshaping ownership structures across the sector.

Tim Benson, Group Managing Director of Infinity Financial Consultants, said the partnership reflected a deliberate decision to prepare the business for a more acquisitive phase of growth.

"Consolidation across advice and accounting is accelerating, particularly as succession challenges continue to build," Benson said. "We didn't want to be reactive. This partnership gives us the capital support and experience to approach M&A in a disciplined way."

Infinity Financial Consultants was advised on the transaction by Berkshire Global Advisors, with Nelson Lam leading the engagement, while legal advice was provided by Mills Oakley partner Tim Cox.

Merchant is not structured as a private equity firm. It operates as an institutional operating company that deploys long-duration capital rather than investing against a fixed fund life. In Australia, its platform has centred on minority partnerships with advisory businesses that want to scale while preserving founder control and long-term autonomy.

Benson said the structure of the investment was critical. "This isn't about flipping businesses or imposing short-term return pressures," he said. "We were looking for a partner that understands how professional services firms grow over decades, not cycles."

The partnership is expected to support Infinity Financial Consultants' ambitions to acquire culturally aligned advice, accounting and lending firms, expand into new regions and provide succession pathways for smaller practices seeking an alternative to trade sales or internal buyouts.

The Infinity Financial Consultants multidisciplinary structure is expected to remain central to its acquisition strategy, with the group favouring firms that can be integrated into its existing advice, tax and lending platform rather than operating as stand-alone bolt-ons.

Merchant Wealth Partners global network includes more than 125 partner firms across six countries, collectively managing in excess of US\$300 billion in assets. Its Australian arm has increasingly focused on firms seeking to professionalise their acquisition strategies as consolidation intensifies.

Benson said access to Merchant's deal experience and post-transaction integration frameworks would be as valuable as the capital itself. "M&A only works if you integrate properly and protect client outcomes," he said. "That's where most consolidators stumble."

While Infinity declined to comment on specific acquisition targets, the firm said it expects acquisitions to become a core growth driver over the coming years as it looks to build scale without compromising its client-first approach.

**End.**

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### **About Merchant Wealth Partners**

Merchant is a private partnership that provides life cycle growth capital and strategic guidance to independent financial services companies, particularly those focused on wealth and asset management. Merchant's ecosystem comprises of more than 125 partner firms and financial services practices in six countries, collectively managing more than \$300 billion in assets. For additional information, please visit [merchantim.com](http://merchantim.com).

### **About Infinity Financial Consultants**

Infinity Financial Consultants is an Australian financial services firm providing holistic financial advice, accounting and mortgage lending solutions to everyday Australians. Founded on integrity and a strong commitment to financial education, IFC supports individuals and families to build, protect and manage their wealth through a disciplined advice process and client-first approach. With expertise across wealth management, cashflow management, asset protection and lending, Infinity Financial Consultants is focused on delivering accessible, high-quality advice. For more information, please visit [Infinity Financial Consultants](http://InfinityFinancialConsultants.com).

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