

MEDIA RELEASE

CLEARVIEW TARGETS SELF-LICENSED ADVISERS WITH DEALER SERVICES OFFER LAVISTA LICENSEE SOLUTIONS

19 November 2018: Listed diversified financial services company ClearView has launched a dealer services offer, giving financial advisers who want to gain and manage their own Australian Financial Services Licence (AFSL) access to the group's award-winning back office.

With LaVista Licensee Solutions, advisers can cherry-pick the services they need from a comprehensive menu that includes compliance and monitoring of authorised representatives, technical helpdesk, marketing and software support.

Alternatively, advisers can opt for an off-the-shelf package of essential dealer services including advice documents and templates, compliance manuals, and education and training.

For those who are considering getting their own AFSL, LaVista can help them understand the application process and their ongoing licensing obligations, before supporting them to obtain the appropriate licence.

According to Todd Kardash, General Manager, Group Licensee, small to medium-sized firms increasingly want the autonomy and flexibility that comes with being self-licensed but without the cost and distraction of running a complete back office.

"We recognise that being part of a dealer group isn't the right option for everyone but through LaVista they can have the best of both worlds," he said.

"Our goal is not to tell advisers how to run their business but to help them meet their legal obligations so they can focus on seeing clients and growing their business, confident that nothing is slipping through the cracks."

LaVista leverages the infrastructure and resources of ClearView's dealer groups Matrix Planning Solutions and ClearView Financial Advice.

In May, Matrix Planning Solutions was named Australia's leading licensee by CoreData for the second consecutive year.

Based on research by CoreData, the services that underpin LaVista are first class, with the group ranked number one for research, compliance support, adviser technology, technical services and revenue payments.

Coinciding with the launch of LaVista, ClearView has also made a number of internal appointments.

Mike Pope has been appointed Chief Executive Officer, LaVista; Allison Dummett has been promoted to Chief Executive Officer, Matrix Planning Solutions and ClearView Financial Advice; and Tanya Seale has been appointed Chief Operating Officer, Licensee Solutions.

All three roles report to Mr. Kardash.

Speaking about the launch of LaVista, Mr Pope said: “There is an increasing number of self-licensed practices and also a growing number of advisers who are interested in getting their own licence and LaVista is keen to partner with both groups to see them succeed”.

For more information, visit www.lavista.com.au

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About ClearView

ClearView Wealth Limited is an ASX-listed diversified financial services company that specialises in life insurance, wealth management and financial advice solutions.

As at 30 June 2018, the group had \$224.8 million in inforce premium, \$2.79 billion in funds under management and 233 financial advisers.