



# MEDIA RELEASE

## MATRIX PLANNING SOLUTIONS TAKES OUT TOP LICENSEE GONG FOR SECOND YEAR RUNNING

June 6, 2018: Data insights company, CoreData Research has named Matrix Planning Solutions as the 2018 Licensee of the Year for the second consecutive year, commending the group's commitment to helping advisers adapt to regulatory change, implement new technologies and grow their businesses.

The prestigious Licensee of the Year Award, which was presented at the Annual Professional Planner Licensee Summit on Monday, recognises excellence in licensee services, support and leadership.

Chief Executive Officer of Matrix Planning Solutions and ClearView Financial Advice, Todd Kardash, said: "We are thrilled to receive this award for the second year running because it cements Matrix's position as Australia's leading licensee and recognises the hard work and consistent performance of the Matrix team".

"There has never been a more challenging time for advisers with ongoing changes to adviser remuneration, mounting compliance and regulation, tougher education and professional standards coming in and increasing uncertainty against the backdrop of a Financial Services Royal Commission, so our focus is on understanding and meeting their needs."

The CoreData study, which asked around 1,500 advisers to rate their licensee across a number of key functions, found Matrix outperformed in the majority of categories including overall adviser satisfaction, adviser loyalty and brand.

CoreData Financial Services Director Sean Allen said Matrix's Net Promoter Score, which gauges adviser engagement, had improved in the past year when most licensees saw their scores decline or flat-line.

"Taking out this Award two-years in a row is a significant achievement which demonstrates that Matrix is continuously striving for improvement," he said.

Mr Kardash added: "Matrix has been partnering with advisers for almost 20 years and is a logical choice for those who want to belong to an experienced, well-resourced and forward-thinking licensee".

"One of our standout offerings is our flagship Strategic Advice Program which is helping advisers broaden the scope of their advice, reshape their business models and price accurately for the value they deliver."

"These awards would not be possible without the dedication and highly skilled staff in the Dealer Group. They are always committed to serving the advisers and their staff so their practices run as efficiently as possible," Mr Kardash said.

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### *About Matrix Planning Solutions*

*Matrix is the licensing partner of choice for professional financial advisers. Matrix is a national network of over 80 highly-qualified, experienced and like-minded advisers who provide personal strategic advice on a broad range of issues including cashflow management, superannuation, investing, insurance, retirement planning and aged care. Since its inception in 1999, Matrix has helped thousands of Australians achieve their financial goals and objectives.*

[www.matrixplan.com.au](http://www.matrixplan.com.au)

### *About CoreData*

*Established in 2002, CoreData is a global market research and consulting firm. The group provides data and research-driven insights to some of Australia's largest financial services companies to support their growth and transformational change. It has four core capabilities: market intelligence, business intelligence, customer intelligence and customer engagement.*

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