

## MEDIA RELEASE

# NEW VIDEO SERIES SOLVES THE ADVICE MYSTERY

Tuesday, May 7, 2019: A new video series launched by diversified financial services company, ClearView, has demystified the financial advice process and reinforced the benefits of professional advice.

The series is titled *Advice under the bonnet* and breaks the advice process into three parts:

- Getting to know your adviser;
- Preparing and presenting a financial plan; and
- Implementing a financial plan and the benefits of ongoing advice.

It has been created in response to growing demand for high quality client-facing resources to support client acquisition, client engagement and practice development in the wake of the Royal Commission.

According to Christopher Blaxland-Walker, ClearView General Manager Distribution, it has never been more important for advisers to clearly articulate the work they do and the personal insight, technical knowledge and experience required to deliver holistic strategic advice.

“Clients need to be reminded constantly, and particularly right now, of the benefits of professional advice,” he said.

“There are changes coming down the line such as annual opt-in requirements and restrictions on the fees that can be paid from superannuation which means advisers must reinforce their value because people won’t opt-in for services they don’t value.”

The *Advice under the bonnet* series forms part of ClearView’s *Future of Advice* initiative which includes a suite of unbranded client-facing articles and resources. Advisers can also participate in webinars and access free business tools via [futureofadvice.com.au](http://futureofadvice.com.au).

Mr Blaxland-Walker said product manufacturers also had a responsibility to help educate consumers about the need to protect and grow their wealth.

“There’s a plethora of reasons why more people don’t seek professional advice. Some think they don’t need it, some can’t afford it, many don’t understand the advice process and others don’t know who to trust and where to go,” he said.

“We may not be able to convince everyone but we can clearly map out the advice process for consumers to make an informed decision based on facts.”

For more information and to access the free *Advice under the bonnet* videos, visit [futureofadvice.com.au](http://futureofadvice.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. The group partners with financial advisers to help more Australians grow and protect their wealth and achieve their financial goals.*

*As at 31 December 2018, the group had \$240.7 million in inforce premium, \$2.62 billion in funds under management and 242 financial advisers. ClearView has been independently rated No. 1 in claims customer satisfaction.*