

NEWS RELEASE

26 September 2011

GUARDIAN LAUNCHES FREE SOA PARA-PLANNING SERVICE

Leading boutique dealer group Guardian Financial Planning has launched a value-adding service, offering free risk Statements of Advice (SOAs) to its national network of advisers.

As a future enhancement, Guardian plans to expand the free para-planning offering over the next 12 months to include any risk advice within superannuation or even attached to comprehensive investment advice.

The service will also help advisers better prepare for a post-FoFA (Future of Financial Advice reforms) environment, where client relationships will be paramount.

Guardian Financial Planning's Executive Manager Simon Harris said: "In a post-FoFA world, advisers are looking to build greater efficiencies into their business processes, so they can invest more energy into what they do best: spending more time with clients and growing their businesses.

"Guardian's para-planning service and free risk SOA offering is aimed at meeting that need, by taking away some of the administrative burden, costs and complexities involved in preparing SOAs."

The offer also aligns with Guardian's strategy to support advisers to grow their business their own way.

Guardian delivers the service by matching advisers with a dedicated para-planner, providing advisers with a personalised service offering.

The service includes a three-day turnaround from receipt of an adviser's request form, to delivery of the completed SOA by a para-planner.

Guardian offers the service nationally through a team of eight full time para-planning professionals.

The service has been piloted since May with selected advisers who have enthusiastically embraced the new service.

Advisers interested in the service can contact Guardian's State support team in their capital city.

-ENDS-

Media Contact:

For more information or to interview Simon Harris, please contact Helen Han from Suncorp Life on: 0457 535 639.

About Guardian Financial Planning

This material has been prepared by GuardianFP Limited ABN 40 003 677 334 AFSL No. 243381 trading as Guardian Financial Planning (Guardian Financial Planning). Guardian Financial Planning is one of Australia's leading advisory groups, with around 150 advisers nationally, looking after the financial needs of more than 130,000 clients Australia-wide. Established in 2001, Guardian Financial Planning offers complete financial

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planning services, with a special focus on providing life risk advice. Guardian has a broad approved product list with representation by many manufacturers and advisers are authorised to provide advice on any superannuation fund including industry funds. Guardian Financial Planning is owned by the Suncorp Group – the largest provider of insurance in Australia.

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