



Media Release

2 May 2012

GUARDIAN ADVICE EXPANDS ADVICE NETWORK WITH FOUR NEW PRACTICES

[Guardian Advice](#) has recruited four new practices in NSW and Victoria - a proof-point of the group's strategy to organically grow its network to more than 200 advisers in the next three years by partnering with independent growth-oriented practices.

Since December 2011, Guardian has added four high-calibre practices to its network, whose advisers are professional risk specialists with strong growth aspirations for their business.

Guardian's core strengths lie in its unique business model. It is owned by Australia's largest insurer, the Suncorp Group, and has a comprehensive offer giving advisers strong support service capability, which assists advisers who provide wealth protection advice by simplifying the advice process.

Guardian Advice Executive Manager [Simon Harris](#) said: "Australia's advice landscape is highly competitive, and with the regulatory changes facing the industry, many advisers are seeking a more certain future with a dealer group offering a compelling partnering model.

"We've attracted these new practices because of our common understanding and focus on risk as our core business, and also shared desire to recruit our next generation of future leaders.

In October 2011, Guardian [repositioned](#) as a risk-focused dealer group aligned to growth-oriented advice practices, with a philosophy to enable advisers to "do business their way."

Since then, the group has had an unprecedented level of interest from the market in how Guardian can partner with and support the growth plans of risk advice practices throughout Australia.

In line with this vision, the group launched a number of growth initiatives recently, including Guardian's free [Risk SOA offer](#), the Guardian Business Academy (an online tool for practice principals which benchmarks the 'health' of their business), and a host of other coaching tools available to its adviser network.

Guardian's support model enables practice principals to focus on running their business their own way. The group gives advisers choice by offering them a dedicated business partner with managerial skills and board-level support, which helps them to run a professional multi-adviser practice.

All four new practices specialise in risk advice. Their advisers include:

Peter Kaleta and Carolyn Wright - Principals, LifeShield (Victoria) LifeShield specialises in providing personal insurance advice for time-poor professionals. Principals Peter Kaleta and Carolyn Wright have used technology and a targeted marketing strategy to build a solid reputation in this area of the market. Peter and Carolyn, combined, have more than 13 years specialist experience in giving personal insurance advice.

Scott Dawkins - Principal, Griffin Financial Services (NSW) Scott Dawkins specialises in holistic risk and superannuation and investment advice to expats returning to and living in Australia. He has experience in building financial practices during challenging times, and believes there are always opportunities to



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deliver quality advice irrespective of market conditions. He recently returned from a seven-year stint building a successful financial planning practice in London.

Philip George - Principal, onePlan Life (NSW) Phil George is the Principal of specialist insurance and superannuation advice practice OnePlan Life. Phil has been in financial services for 20 years. Prior to being a financial planner, he worked in the building industry, giving him experience that helps him relate well to tradesman and small business owners. His skills and passion for wealth accumulation and protection, combined with personal insurance will reinvigorate an existing client base of Guardian clients.

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About Guardian Advice™

This material has been prepared by Guardian Advice™ ABN 40 003 677 334 AFSL No. Guardian Advice™ 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 Advice™ is an aligned dealer group of Asteron Life and offers complete financial planning services, with a special focus on providing life risk advice. Guardian Advice™ 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 Advice™ is owned by the Suncorp Group – the largest provider of insurance in Australia.

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