

NEWS RELEASE

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Guardian Financial Planning repositions as growth AFSL to attract IFAs looking for growth

Over the next three years, Suncorp Life dealer group Guardian Financial Planning will reposition itself as the AFSL that partners with professional financial advisers, to make wealth protection and complimentary super and investment advice easy for advisers.

Leading the strategy is Guardian Financial Planning's recently appointed Executive Manager Simon Harris, who says he is committed to creating an environment where Guardian advisers have access to a significantly simplified advice process.

"We are looking to partner with professional advisers who are seeking a supportive AFSL that has the capacity to support their profitable growth aspirations," Mr Harris said.

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

"The Guardian team is very clear that our business is a fully intermediated business, where the adviser owns the client. Those clients can range from anyone, whether they are high net wealth accumulators, or Mums and Dads who are looking for some insurance advice to protect their assets for their children's future. While we have strong institutional backing from Suncorp, Guardian runs its business independently. Our philosophy is about giving advisers the opportunity to also run their business independently, with a strong support network behind them to help them develop and grow their business," Mr Harris said.

"As an independent AFSL network not aligned to one of the big banks, Guardian also has open architecture in terms of our product list. Advisers don't want to be told what to do by a big bank, but if they want to work as an independent business person, Guardian will provide a support network that encourages profitable growth through a commercial and pragmatic compliance support programme, the 'Guardian Business Academy Toolkit' and a wealth protection-focused professional development programme."

With recent innovative growth initiatives such as Guardian's '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 is focused on advice businesses who want to grow.

Guardian will look to grow the business organically over the next three years, with a targeted recruitment program to hire professional advisers with growth aspirations - but will manage that growth selectively by targeting only advisers and practices with the right cultural fit for Guardian.

"We have a very compelling proposition for advisers who want to align to a financially viable AFSL focused on helping them to grow their business," Mr Harris said.

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For more information or to interview Simon Harris, please contact Helen Han from Suncorp Life Corporate Affairs 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 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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