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Hillross firm joins Matrix

Partnered approach

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Former Hillross Financial Services member firm, EWL & Associates Financial Services (EWL), has joined Matrix Planning Solutions (Matrix), the dealer group has confirmed.

Located in Mascot, New South Wales, the practice was established over 40 years ago by managing director and co principal financial planner Ed Leuenberger.

The second co principal financial planner, Darren Frawley, joined the firm in 1996 and since then has helped transition the business to fee for service alongside Leuenberger.

Matrix said EWL services a wide range of clients in the areas of wealth accumulation, superannuation, pre-retirement and retirement planning, personal and business life insurance, aged care and estate planning.

Leuenberger, who has been in the financial services industry since 1969, initially established a life insurance business with AMP before moving the business into the financial planning arena in 1987 and joining AMP-owned dealer group Hillross Financial Services.

Leuenberger said since that time, EWL has grown organically through new business leads and referrals.

"What attracted us to Matrix was that we shared the same values - namely the pursuit of growth and professionalism," Leuenberger said.

"In all my years in this industry, I have never experienced the level of service that we have received from Matrix. The support is excellent."

Meanwhile, Frawley said Matrix offers a partnered approach, focussed entirely on the practice's success.

EWL is the financial planning arm of the larger EWL Group, which also comprises a general insurance arm and a mortgage broking arm.

There is a total of eight staff working across the full business, with four employed within the financial planning division.

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