

Media Release

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ClearView strengthens commitment to financial advice with key appointment

Listed diversified financial services company, ClearView Wealth Limited has appointed former Australian Unity Financial Advice executive Tony Mantineo to the newly-created position of Head of Business Growth to spearhead adviser recruitment for the group's flagship dealer group, Matrix Planning Solutions, and B2B outsourced offer, LaVista Licensee Solutions.

Mr Mantineo, whose previous roles include General Manager of Business Growth at Australian Unity Financial Advice and National Business Growth and Alliances Manager at Millennium 3 and Financial Services Partners, has over 30 years' industry experience.

He will be based in Melbourne and report to ClearView General Manager, Licensee Services, Todd Kardash.

"Tony is a highly-respected financial services professional and his appointment reinforces our commitment to building a strong, scalable financial advice business," Mr Kardash said.

"We are not seeking thousands of advisers but rather our focus is on creating a select community of quality professional businesses using our services."

"Over the past few years, ClearView has invested significantly in technology and infrastructure to support advisers to deliver high quality advice, manage mounting compliance and run more efficient practices. In an environment of ongoing change and disruption, we are strongly positioned to partner with advisers who want to continue growing their business."

Mr Mantineo said the combination of ongoing structural and regulatory change, lengthy remediation programs inside institutions and higher client expectations were behind the increasing number of advisers reviewing the suitability and long-term viability of their licensing arrangements.

"There is a lot of movement in the market at the moment with many advisers exploring their options including switching licensees or gaining their own AFSL," he said.

"ClearView is in a unique position because it has the ability to continuously invest in its offer and the flexibility to cater to the different needs and preferences of advisers."

Matrix Planning Solutions offers comprehensive licensing and dealer services to advisers who want the backing of a strong, well-resourced company.

LaVista Licensee Solutions, which was launched in late 2018, supports third-party dealer groups and the growing number of self-licensed advice firms.

For more information, please contact:

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About Matrix Planning Solutions

Established in 1999, Matrix is the licensing partner of choice for professional financial advisers.

The Group's financial advisers provide personal strategic advice on a broad range of issues including superannuation and investments, wealth protection, retirement planning and aged care.

Matrix Planning Solutions is a subsidiary of ClearView Wealth Limited (ASX: CVW).

About LaVista Licensee Solutions

LaVista Licensee Solutions is a wholly-owned subsidiary of listed diversified financial services company, ClearView Wealth Limited (ASX: CVW).

LaVista Licensee Solutions provides dealer services to financial advisers who want to gain and manage their own Australian Financial Services Licence. The group leverages the award-winning back-office infrastructure and resources of ClearView's dealer groups Matrix Planning Solutions and ClearView Financial Advice.

Based on research by CoreData, the services that underpin LaVista are first class, with the group ranked number one for research, compliance support, adviser technology, technical services and revenue payments.
