



MEDIA RELEASE

MATRIX PLANNING SOLUTIONS WINS COVETED LICENSEE OF THE YEAR AWARD

June 2017: Matrix Planning Solutions has won the prestigious 2017 Licensee of the Year Award, cementing the group's position as Australia's leading group for professional, client-centric financial advisers.

The Licensee of the Year Award, which is run by independent market research firm CoreData in conjunction with financial planning publication Professional Planner, recognises a financial services group that provides exceptional service, support and value.

According to CoreData, which surveyed over 1,500 financial advisers about their licensee, Matrix stands out as a group with a sharp focus on meeting the needs of advisers and a passion for helping practices boost their efficiency, productivity and profitability.

CoreData's research found over 93 per cent of Matrix advisers feel valued and supported to grow their business with more than 80 per cent of practices recording an uplift in profit in 2017.

This is compared to an industry average of 65 per cent of advisers who feel valued and supported.

"At a time when there's considerable licensee dissatisfaction and movement, particularly in the institutionally-aligned space, there's a lot of positive sentiment and unity within Matrix which creates an ideal environment for practices to thrive," said CoreData director Sean Allen.

The CoreData study, which asked advisers to rate their licensee across 11 key functions, found Matrix outperformed in all categories. It excelled in seven areas: marketing support and communications, compliance support, technical services, business planning, practice development, adviser technology and payments and brokerage.

Chief executive officer of Matrix Planning Solutions and ClearView Financial Advice Todd Kardash said the Award acknowledged the hard work and dedication of the Matrix team.

"Matrix is an established, respected advice brand which has become synonymous with professional, knowledgeable advisers," he said.

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“At the licensee level, there’s a highly competent, effective team who are focused on providing excellent service and using technology to help advisers run more efficient practices so they can focus on giving quality strategic advice to more Australians.”

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About Matrix Planning Solutions

Matrix is the licensing partner of choice for professional financial advisers.

Matrix is a national network of over 80 highly-qualified, experienced and like-minded advisers who provide personal strategic advice on a broad range of issues including cashflow management, superannuation, investing, insurance, retirement planning and aged care.

Since its inception in 1999, Matrix has helped thousands of Australians achieve their financial goals and objectives.

www.matrixplan.com.au

About CoreData

Established in 2002, CoreData is a global market research and consulting firm. The group provides data and research-driven insights to some of Australia’s largest financial services companies to support their growth and transformational change. It has four core capabilities: market intelligence, business intelligence, customer intelligence and customer engagement.

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