

# Media Release

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## Matrix named one of Australia's leading licensees four years in a row

Matrix Planning Solutions – three-time winner of the Professional Planner / CoreData Licensee of the Year Award – has been named one of Australia's leading Australian financial services licensees for the fourth consecutive year.

In a competitive field, Matrix was a finalist in the annual CoreData Licensee of Year Awards, which recognise excellence in the running of a licensee business and the provision of high quality services, as judged by financial advisers themselves.

According to CoreData, the awards reflect adviser satisfaction with their licensee across over a dozen aspects of their service offering including fees, licensee structure and network dynamics.

“The winners and finalists each showed themselves to be capable of delivering a highly rated level of service and support to advisers in an extremely challenging environment,” CoreData said.

“Financial advice is grappling with the implication of thousands of advisers choosing to leave the industry as it continues a transition to a professional structure and footing.”

“The highest-rated licensees are those best supporting advisers and their businesses to navigate the required changes, while proactively identifying and helping to manage out of their networks those practices and advisers unable or unwilling to make the transition.”

Matrix Chief Executive Officer Allison Dummett said the group continued to invest significantly in people and technology to drive ongoing success.

“It is fantastic to be consistently recognised for providing outstanding support to advice businesses, especially considering a significant number of new practices have joined Matrix in the past year,” she said.

“That said, we are not resting on past achievements. We continue to invest heavily in our systems, processes and technology because our mission and purpose is to be the strong silent partner behind our advisers.”

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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 116 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).