

Australian Unity Personal Financial Services

10 September 2015

Australian Unity Personal Financial Services *given 98 percent approval rating by their advisers: Survey*

In a recent formal survey of their practice principals, Australian Unity Personal Financial Services was given an almost unanimous vote of confidence.

Chief Executive Officer of Australian Unity Personal Financial Services, Mr Steve Davis, said the licensee scored highly in all key areas.

"In terms of how happy the practice principals are with our overall service to them, 63 percent of advisers said 'highly satisfied', and 35 percent said 'satisfied'.

"To the question of whether our advisers would recommend another adviser to join us, 68 percent said 'highly likely', and 17 percent said 'likely', with 15 percent saying 'possibly'.

"Further, as to whether our advisers think our support, guidance and service represent good value for money,

88 percent responded with 'usually' to 'always'. And 87 percent indicated we add value to their practice 'usually' to 'always'," Mr Davis said.

He added that a large number of Australian Unity's specific services and cultural imperatives were given approval ratings of over 90 percent. These included:

- The helpfulness of our staff
- Tailoring our services to match advisers' needs
- The reliability and responsiveness of our services
- Technical and strategy support
- Compliance reviews and assistance
- FDS service
- Investment and asset allocation assistance

Responses to key survey questions

Overall, how satisfied are you with the service provided by AUPFS?			
Very unsatisfied	Unsatisfied	Satisfied	Very satisfied
0%	2%	35%	63%

Would you recommend another financial planner to join AUPFS if you had the opportunity?			
Not at all	Possibly	Likely	Highly likely
0%	15%	17%	68%

Do you think our support, guidance and service represent good value for money?				
Not at all	Sometimes	Usually	Almost always	Always
0%	12%	18%	35%	35%

- The quality of our APL and investment research
- Model portfolios
- Marketing tools
- Xplan functionality
- Help with using Xplan
- Client and COI newsletters
- Guidance on developing COI relationships
- 'Best practice' service
- Annual conference
- PD Days
- Masterclasses
- Admin academy
- Brokerage assistance
- Assistance when new regulations are introduced
- Keeping advisers informed about issues that will affect them
- Delivering on our promises

"The survey results are very pleasing and strongly confirm that we have a very attractive model for advisers, particularly as we are a mutual organisation focused on helping our advisers, and not a bank or life insurance company.

"Our relationship with our advisers is based primarily on a full service offering, with a broad open-architected APL for wrap accounts, direct and managed investments, and risk insurance.

"And, importantly, we never rest on our laurels and we never take our advisers for granted. We are always looking at ways to improve our service to our advisers, and building new services which can help our advisers become more efficient and profitable, and provide a better value-add service to their clients.

"The results from this survey reinforce those from an independent industry-wide survey* in 2013 which rated Australian Unity Personal Financial Services the number one dealer group for adviser satisfaction. AUPFS scored 90 percent overall which was well ahead of the industry average of 68 percent," Mr Davis said.

*The service quality scores were derived after researching a representative sample of advisers from each of the AFSLs for 19 service factors; the scores were then weighted in line with the importance of each of the nineteen service factors. 1,015 advisers contributed to the national research project in June 2013 conducted by Tepana Financial Indices.

Who is Australian Unity Personal Financial Services?

We specialise in providing professional strategic advice to help you improve your current financial position and ultimately achieve your long term lifestyle goals.

Importantly, our initial advice isn't a 'set and forget' service. Instead we offer you regular financial mentoring and ongoing guidance – in all aspects of your personal finances – to set you, and keep you, on the path to financial wellbeing.

Our team of experienced financial professionals can provide you with a detailed and totally tailored blueprint for financial success in any or all of the following areas:

- Financial advice
- Wealth creation
- Retirement planning
- Investments
- Superannuation
- Home loans
- Commercial loans
- Investment loans
- Equipment finance
- Car finance
- Personal estate planning
- Business estate planning
- Personal risk insurance
- Business risk insurance
- General Insurance

Australian Unity has a proud 175 year heritage of helping Australians create secure financial futures. This pedigree and experience, combined with our corporate strength and leading edge strategic advice capability, means we are uniquely placed to offer you high quality personal financial services... each finely tuned to your particular needs to ensure you achieve your vision of a secure financial future.

After all, your financial wellbeing is at the heart of everything we do.

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