



Media release

July 2008

Plum gives its members momentum with new offer

Plum Financial Services Limited (Plum) is relaunching the suite of financial advice and lending services with some new additions, to better cater to the diverse financial needs of all members.

Called the Momentum suite of financial advice and lending services, it comprises a refreshed advice and mortgage lending offers, as well as an additional service, tailored to the needs of high net worth individuals.

According to Plum's Managing Director Mike Fitzsimons, the Momentum suite of services* relaunch follows member and client feedback† on Plum's financial planning offer.

'Our financial planning model is one the best in the industry, with a comprehensive vetting process of all advisers to assist Plum's members in receiving the best value and quality advice,' Mr Fitzsimons said.

'Plum members have been able to access face-to-face financial planning (inclusive of a free first session) and free telephone-based general advice, for a number of years. In 2007, we went out to our members and asked them what they thought of the education, relationship and financial advice model. They told us it was comprehensive and catered to most members' financial needs, but we felt it did not fully cater to high net worth individuals.'

'That was where the idea for the refreshed suite of financial advice and lending services originated and we have since developed a service specifically for executives and high net worth individuals as a result.'

All advisers recommended by Plum operate on a Fee for Service basis for superannuation and investment advice.

The Momentum suite of services for Plum members comprises:

- Momentum Financial Advice - provides holistic financial advice
- Momentum Loan Solutions – a brokering service enables access to home loans from quality lenders
- Momentum Private Wealth - a specialised holistic program to meet the more complex needs of executive members

Momentum Private Wealth is the new addition to Plum's offer and comprises handpicked financial planners, who have a consistent track record of high performance and experience dealing with high net worth individuals.

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* Note: The Momentum suite of services are provided to Plum members by GWM Adviser Services Limited

† Plum Member Satisfaction Research 2007. Conducted by Forethought Research.



Further information:

For more information on Plum, photos or an interview our Managing Director Mike Fitzsimons please contact:

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About Plum

Plum Financial Services Limited ABN 35 081 812 731 AFSL 243356, a wholly owned subsidiary of MLC Limited, provides integrated superannuation solutions for medium to large Australian corporations. Purpose-built for the era of member investment choice, Plum's philosophy is about providing members with a meaningful education experience to help build their knowledge and understanding of superannuation so that they are empowered to manage their financial future. One of Australia's fastest growing corporate superannuation providers, Plum now administers approximately \$9 billion of committed assets for 82 clients and approximately 132,000 members. More information about Plum is available at www.plum.com.au.

Note: An interest in the Plum Superannuation Fund (Fund) RSE R1056945 is issued by the PFS Nominees Pty Ltd (Trustee) ABN 16 082 026 480, AFSL 243357 RSE L0002912. The Fund administrator is Plum Financial Services Limited (Plum) ABN 35 081 812 731 AFSL 243356. This material has been prepared by Plum and it contains information that is general in nature. The information does not take into account your objectives, financial situation or needs. Before acting on the information you should consider whether it is appropriate having regard to your personal circumstances. Plum recommends that you consider the Fund's Product Disclosure Statement (PDS) before you make any decisions about your superannuation. If you need help in making a decision Plum recommends that you seek advice from a qualified financial planner. Neither Plum, the Trustee, nor any other company in the National Australia Group of companies accepts liability whatsoever for any decision that is made on the basis of or in reliance of the information contained in this material. To obtain a copy of the Fund's PDS please call a Plum Member Services Consultant on **1300 55 7586**. Please note that the information contained in this material is current as at July 2008. Any changes in law or policy have not been incorporated.

The Trustee has entered into an agreement with GWM Adviser Services Limited (GWM Adviser Services) ABN 96 002 071 749 AFSL 230692 to provide advice and mortgage broking services to members of the Fund. The Trustee, Plum and GWM Adviser Services are part of the National Australia Group of companies.

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