

ASX Announcement

16 Apr 2025

Centrepoint Alliance to acquire Brighter Super's comprehensive financial advice book

Centrepoint Alliance Limited (ASX: CAF) ("Centrepoint" or "the Company"), a leading provider of financial advice and services to financial advice firms and customers throughout Australia, is pleased to announce that it has entered into an agreement to acquire the comprehensive advice review book from a wholly owned entity of Brighter Super, ESI Financial Services Pty Ltd. Brighter Super is a Queensland-based superannuation fund with approximately 280,000 members. This strategic acquisition will enhance Centrepoint's ability to provide high-quality financial advice to a broader client base.

Brighter Super has recognised the need to scale its advice offering to provide more comprehensive advice to its members. Brighter Super has selected Centrepoint as its preferred partner due to Centrepoint's existing relationships and geographical presence. The acquisition includes up to 400 customers that will potentially transition, which in total generate circa \$1 million in annual revenue.

Financial Advice Matters Pty Ltd ("FAM"), a wholly owned salaried advice business of Centrepoint, has had a long history of providing strategic advice to industry fund members and currently looks after circa \$1 billion in funds under advice across many funds. Brighter Super has chosen FAM to provide comprehensive advice services to its members who require more complex, personalised support.

The transaction is structured to ensure that only current review customers who agree to transition to FAM by 16 May 2025, will be included in the purchase price. The purchase price is based on a multiple of 1.25 times revenue that is transitioned.

Centrepoint will offer employment to an agreed number of Brighter Super's financial advisers through novated employment agreements, depending on the number of customers that transition.

Additionally, FAM have entered a 3-year referral arrangement to provide comprehensive advice to Brighter Super's members.

Centrepoint is excited about this opportunity to expand its service offerings and strengthen its position in the financial advice market.

The release of this announcement has been authorised by the Board of Directors.

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About Centrepoint Alliance

Centrepoint Alliance (ASX: CAF) offers a range of services to financial advice firms throughout Australia. The company operates five core business lines: Licensee Services, Financial Advice, Investments, Platforms and Lending.

Licensee Services provides services to licenced and self-licenced advisers, consisting of licencing options, practice management, compliance, research, education and technology. Financial Advice is an in-house network of financial advisers, who provide personalised and holistic advice to clients. Investment Solutions source high quality underlying investments and construct diversified managed account portfolios. Platform Solutions provides portfolio services for investment and superannuation. Lending Solutions supports brokers and advisers with a credit licence, technology, lending panel, training and education.

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