

ASX Announcement

21 May 2025

Acquisition of Annual Review Service Advice Book from Brighter Super – Confirmation of Completion Timetable

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, provides the following update regarding the acquisition of Brighter Super’s Annual Review service advice book.

As previously announced, Centrepoint entered into an agreement to acquire the Annual Review service advice book of Brighter Super, a Queensland-based industry fund with approximately 285,000 members. The transaction is being executed through Financial Advice Matters Pty Ltd (“FAM”), a wholly owned salaried advice business of Centrepoint, which has a strong track record of providing strategic advice to industry fund members and currently manages approximately \$1 billion in funds under advice.

Timetable Update

- Brighter Super members had until 16 May 2025 to opt out of the transition to FAM.
- Of the approximately 400 members eligible to transition, 316 members who have a fixed term contract due for review over the next 12 months have confirmed they will transition to FAM, and an additional 30 members are in the process of having reviews and signing new agreements.
- Brighter Super has until 11 June 2025 to complete its audit and provide Centrepoint with final numbers, including client counts and associated fees. These figures will be used to calculate the final consideration for settlement.
- Settlement is scheduled for 13 June 2025.
- A final announcement will be made on 17 June 2025, confirming final numbers, including client counts and associated fees expected to arise from the transition and the final consideration paid.

Centrepoint looks forward to welcoming Brighter Super members into its network.

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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