

## ASX Announcement

1 November 2021

### Centrepont Alliance Completes Acquisition of ClearView Advice

Centrepont Alliance Limited (ASX: CAF) ("Centrepont Alliance" or "the Company"), a leading provider of advice and business services to financial advice firms throughout Australia, is pleased to advise that the Company has completed its transformational acquisition of ClearView Financial Advice Pty Ltd, Matrix Planning Solutions Ltd and LaVista Licensee Solutions Pty Ltd ("ClearView Advice") from ClearView Wealth Limited (ASX: CVW).

Centrepont Alliance first announced its proposed acquisition of ClearView Advice on 25 August 2021. As the businesses that make up ClearView Advice are leading providers of licensing solutions to financial advisers, the acquisition supports the Company's strategic objective of building a profitable and market-leading advice service business at scale.

The acquired businesses benefit from best-in-class technology which allows for automated compliance monitoring and supervision across all clients under the licensee. ClearView's advice businesses have been named Australia's Overall Licensee of the Year in three out of the past four years, as rated by independent research company CoreData.

The acquired businesses are highly complementary to Centrepont Alliance's existing operations, adding a strong technology and compliance capability to the business while boosting the Company's financial scale and welcoming 281 advisers to its network. The acquisition creates a powerful combination of intellectual property, skills, experience and balance sheet access, setting the platform to participate in further organic and strategic transactional growth as industry disruption continues.

Centrepont Alliance CEO, John Shuttleworth, said:

*"We are delighted to complete our acquisition of ClearView Advice and welcome its highly capable team to the Centrepont Alliance group. The combined group now has more than 1,300 licensed and self-licensed advisers across Australia, making the Company one of a select number of independent advice and business services firms with the scale and efficiency to deliver strong profitability."*

*"We have been impressed in the first few months by what the award-winning ClearView Advice businesses have contributed operationally, and also by what ClearView Wealth Limited has contributed strategically as a key partner and stakeholder."*

*"Since announcing the acquisition, we are well advanced integrating the businesses. Having finalised our operating model and organisational structure, we have strengthened our senior leadership team with employees from both ClearView and Centrepont Alliance. From tomorrow all employees will be co-located in the Centrepont Alliance offices and will commence operating as part of one integrated company. We are excited by what the future together will bring us."*

Following approval and authorisation by shareholders at the Company's Annual General Meeting, Centrepont Alliance has issued 48,000,000 fully paid and 12-month escrowed ordinary shares to ClearView Wealth Limited as the final component of consideration payable under the transaction. The issue results in ClearView Wealth Limited becoming a strategic and substantial investor in Centrepont Alliance, controlling 25% of the voting power in the Company.

Centrepont Alliance continues to assess partnerships and other acquisition opportunities, as well as look at ways in which the Company can deliver stronger financial results and enhance shareholder value in the years ahead.

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

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#### **About Centrepoint Alliance**

Centrepoint Alliance (ASX: CAF) is a leading provider of advice and business services to financial advice firms throughout Australia. It offers a complete suite of governance, business management, client growth and advice services that enable advisers to spend more time providing advice to their clients.

Centrepoint Alliance is proactively leading the evolution of financial advice business models in Australia. It has introduced a clear fee-based pricing model that will support the provision of more transparent and better financial advice for Australia, increasingly through the use of digital and data technology enabled solutions.

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