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EQT expands private wealth services business

As part of its strategy to further strengthen its private wealth services business, Equity Trustees Limited (EQT) has created the role of National Manager – Advice and Personal Services, recruiting Julie Foster into the position.

In this new role, Ms Foster will be responsible for all EQT's advice services including its aged care advisory and placement businesses, corporate superannuation advice, and personal wealth management.

She has over 20 years experience in the financial services sector, working in distribution and marketing roles at organisations including TOWER Australia, Suncorp, CBA and Colonial Limited. Most recently, Ms Foster ran a business consulting and change management company for the financial services industry, 4Quadrant.

Geoff Rimmer, head of EQT private wealth services (PWS), said that Ms Foster's experience and skills will assist in bringing together the wide range of specialist areas that PWS operates in, so that it offers one advice model to clients and partners.

"EQT is positioning itself to ensure it is fully compliant with the new Future of Financial Advice (FOFA) reforms, as well as helping other financial planning organisations meet the 'best interest' and 'know your client' requirements of FOFA.

"In particular, Julie's background in business development and transformation, and focus on client engagement, will be extremely valuable in helping EQT with its business growth plans. These include working more closely with financial planning groups to provide specialist support and assistance in the post-FOFA environment," Mr Rimmer said.

About Equity Trustees:

Equity Trustees is a publicly listed company offering private wealth services as well as fiduciary services to corporate clients.

Its private wealth services business encompasses aged care financial advice and placement services, wills and estate planning, philanthropy and personal trusts, superannuation, and investment advice.

Equity Trustees employs over 180 people in its Melbourne, Sydney and Brisbane offices.

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For more information please contact:

Geoff Rimmer

Phone: 02 9458 5501

Email: grimmer@eqt.com.au

Equity Trustees Limited

AFSL No 240975 ABN 46 004 031 298

Level 2, 575 Bourke Street Melbourne Victoria 3000 Telephone (03) 8623 5000 Facsimile (03) 8623 5200

Email equity@eqt.com.au Website www.eqt.com.au