

19 October 2026

Equity Trustees enters exclusive referral partnership and makes an equity investment in Willed Technologies

EQT Holdings Limited (ASX: EQT) today announced it has entered into an exclusive 5-year mutual referral agreement for selected executor and trustee services with Willed Technologies Pty Ltd (**Willed**), a leading Australian digital estate planning business. EQT will also acquire a \$5 million equity interest in Willed.

Founded in 2020, Willed provides digital estate planning services, including online wills and related end-of-life planning solutions as well as affordable funerals and cremations to Australian consumers through its technology-enabled platform.

The partnership comprises:

- An exclusive mutual referral agreement¹ under which Willed will refer customers of its online platform to Equity Trustees for the provision of professional executor and trustee services. Equity Trustees will pay Willed a distribution fee for these referrals and will refer certain clients to Willed for the delivery of probate services, and
- Equity Trustees entering into a subscription agreement with Willed for a \$5 million equity investment in the company (subject to the satisfaction of customary conditions precedent) which will also include the right to nominate a non-executive director to the Willed board.

The partnership and investment support Equity Trustees' strategy of expanding reach and access to its specialist estate planning, executor and trustee services through fast growing digital customer channels.

EQT Managing Director Mick O'Brien said: "More than half of Australian adults do not have a valid will in place, highlighting a significant gap in estate planning. This strategic arrangement combines accessible digital estate planning services with Equity Trustees' specialist executor and, trustee expertise, making professional estate planning and estate administration services available to a wider range of Australians.

"As more Australians choose to prepare wills online, our partnership with Willed creates a pathway to our specialist professional executor and trustee services."

The parties will also explore additional opportunities to enhance customer access to varying levels of estate planning services over time.

Willed Founder and CEO Dave Kaplan said: "Willed's mission is to make end-of-life planning more accessible, secure and affordable for Australians. Through digital innovation and disruption, we have sought to modernise how Australians engage with estate planning and related services.

"This strategic partnership strengthens our offering by connecting customers with Equity Trustees' specialist executor and trustee services, enhancing the support available to our customers throughout their estate planning journey. The partnership supports our continued growth as we pursue our mission to be Australia's leading disruptor in end-of-life services."

Since inception, Willed has assisted ~200,000 Australians with their end-of-life planning needs through the Willed platform.

The partnership is expected to support Equity Trustees' growth ambitions through increased affordable access to estate planning and easier access to executor and trustee services.



¹If the relevant conditions precedent to the subscription agreement are not met by the nominated date the mutual referral agreement between the parties will be terminated.

The Managing Director has authorised this release.

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Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services, superannuation trustees services and Responsible Entity (RE) services for external Fund Managers. Equity Trustees is the brand name of EQT Holdings Limited (ABN 22 607 797 615) and its subsidiary companies, publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Adelaide, Sydney, Brisbane, Perth.