

New Link Group partnership with Retirement Essentials expands advisory offering to get members retirement ready

7 April 2021: A new partnership between Link Group and fintech Retirement Essentials will broaden Link Group's advisory offering for superannuation clients, by supporting their customers to be retirement ready.

The partnership makes personal financial advice affordable and accessible to all members and furthers Link Group's goal to help Australians retire ready and live well in retirement. The service is aimed at getting customers ready for retirement by incorporating affordable financial advice on Government Age Pension eligibility with assistance and lodgement of the customer's age pension application via SuperEd's Retirement Essentials service.

Not only will retiring members be able to access affordable financial advice, eligible members will also have their application submitted for the age pension via SuperEd's Retirement Essentials service. Members will be guided along the entire path ending up with their retirement income in place.

Commenting on the transition, Dee McGrath, Chief Executive Officer, Retirement and Superannuation Solutions, said:

"At Link Group we continue to invest in market leading technology that connects members to their funds while augmenting the information they receive on performance with tools to assist in achieving their super savings goals. One of the most important steps is for members to understand how to transition to retirement with the best outcomes financially.

"Our partnership with Retirement Essentials provides an important piece of the puzzle for an all-encompassing retirement solution offering. Researching and preparing for retirement can be a daunting process. Our clients' members can now be confident that they have both the systems and advice they need to manage the transition."

Retirement Essentials is a member-based financial technology service for Australian seniors. It combines human-centred technology with personal support to assess members' working capital and present all retirement options and supplementary income services available to them.

Talking to the combined product offering, Hugh Morrow, Managing Director of SuperEd, parent company to Retirement Essentials, said:

"We're excited to expand our offering through Link Group. Our overarching goal is to make retirement easy for all Australians. We are excited to combine our capabilities with Link Group's technology and existing advisory services to deliver an unparalleled solution for funds with proven benefits for fund members."

Post-retirement, nearly two-thirds of Australians receive government assistance as their main source of income to meet everyday costs of living, yet many Australians are unaware of their eligibility due to complicated applications and an assumption of ineligibility. With 82% of retirees actively seeking help to apply for the age pension, Link Group's precise analytics on retirement savings and spending will enable them to accurately identify when members would most benefit from assistance.

For members still actively working their way to retirement age, the partnership will provide 'Superannuation Health Checks' to help members prepare for retirement through access to timely information, advice and options in the lead up to the milestone.

The service partnership labelled 'Retirement Ready' will be available to members from April 12.

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Media Contact

Nick Howe, GRACosway, +61 407 183 221, nhowe@gracosway.com.au

James Coyle, SuperEd, +0419 883761, james.coyle@supered.com.au

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From equities, pension and superannuation to investments, property and other financial assets, we partner with thousands of financial market participants to deliver services, solutions and technology platforms that enhance the user experience and make scaled administration simple.

We help manage regulatory complexity, improve data management and provide the tools to connect people with their assets, leveraging analysis, insight and technology.

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