



Media Release

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DKN reinforces the value of financial advice

Feedback from advisers reveals a degree of conservatism among investors in this post-GFC climate so DKN Financial Group has introduced a new client engagement program to help advisers overcome this confidence barrier and reinforce the value of strategic advice provided by a trusted financial expert.

While DKN is seeing evidence of improving investor sentiment with a near doubling in net flows from \$300 million last financial year to a target of \$550 - \$600 million this financial year, this is well below the FY08 net flow of \$1 billion, reinforcing adviser feedback that many existing and new investors still lack the confidence to invest funds.

Commenting on the introduction of this program, DKN Chief Executive Officer Phil Butterworth said: "Over the last six months, there has been a switch out of cash and back into the markets highlighting the fact that expert advice is crucial to ensure the strategic plan and investment strategy is in line with the client's long term goals. This is a perfect time for advisers to be actively engaging with their existing clients and also seeking out referrals through current and potential sources to drive new business."

"While many industry funds have dismissed the value of paying for advice, DKN has always believed that there is strong value in seeking the knowledge of financial experts and has developed this client engagement program to assist financial planners re-energise relationships with their existing clients and expand their client base," he added.

DKN has incorporated adviser feedback to develop a series of tools within the program to support the individual marketing activities of practices, encouraging investors to seek the advice of their adviser in re-assessing their financial goals for the future.

The client engagement program provides the following tools which can be branded individually for each practice:

- Client brochures outlining the value and need for expert advice
- Suggested calendar outlining implementation of the program
- Suggested client letter template
- Follow up email template for current and lapsed clients
- Website content for advisers' websites
- Material to include in client presentations

The program has been released to all practice clients of the DKN Group which incorporates Lonsdale Financial Group.

With over 25 years operating as a full service dealer group, Lonsdale Financial Group (Lonsdale), a wholly owned subsidiary of DKN Financial Group has provided much assistance in the development and implementation of this program.

Commenting on the development of the program, Mario Modica, CEO of Lonsdale Financial Group Limited said: "The Lonsdale Business Management team has worked hard with the Lonsdale Associates in order to assist them in taking advantage of the tools created, and making the most of the opportunities that emerge from it.

"Wealth management practices have the choice of using the tools in entirety or picking and choosing elements that work within their business plans. As advocates of fee for service, we see this as the right time to remind clients why they seek the expertise of a financial planner, and the inherent value in that advice. These tools will assist in reinforcing this message.

"We anticipate that implementing this program will assist advisers to develop deeper relationships with their existing clients, reinforcing them as a financial expert within their community and driving new business."

This client engagement program is the first of a series that will be launched regularly to the aligned advice channels of the DKN Group and reflects the Group's commitment to continuing to provide an outstanding and diverse service offering.

For further comment:

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