



MEDIA RELEASE

A NEW ERA FOR ADVICE BUSINESSES WITH LAUNCH OF ENTIRETI

April 22, 2024: Following Fortnum Private Wealth's (Fortnum) recent acquisition of Australian Unity's financial advice business, Personal Financial Services (PFS), the group has created a new parent company brand called Entireti.

Entireti will become the overarching brand identity that encompasses the group's business services and licensing offerings. This includes the leading brands of Fortnum and PFS, as well as any future take-to-market propositions.

According to Neil Younger, Entireti's Chief Executive Officer, Fortnum and PFS will continue to operate under their respective names in recognition of their unique positions in the market, significant goodwill, and the brand equity both businesses have built over many years.

"The name Entireti perfectly sums up what we are all about," Younger said.

"It implies completeness as a unified group, rather than standalone parts. It also reflects our collective strength, community culture and robust foundation."

"We see a great opportunity to drive the evolution of our industry over the coming years and for Entireti to be recognised as Australia's leading advice services business."

In November 2023, Fortnum acquired Australian Unity's financial advice business taking over the provision of business and licensing services to PFS' 170+ advisers.

Today, Entireti employs over 55 staff and services around 400 financial advisers nationally. The group's 170 advice businesses collectively oversee in excess of \$30 billion in funds under advice, on behalf of over 60,000 clients.

Matt Brown, Executive General Manager of Advice at Entireti, said the new brand would further unite the group's people and empower them under a common purpose.

"We're already one of Australia's premier business and licensing services organisations, which is reflected in our network of exceptional advisory firms, and we want to help more advisers deliver quality advice and grow their business," Brown said.

"We have ambitious plans, which includes expanding the range of services we offer, as we strive to meet the holistic needs of professional advice businesses."

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