

ACCLAIM

MANAGEMENT GROUP

Acclaim Management Group (AMG) Strategic Vision

It is June 2023 and we are the promoter of that AMG Super fund and the Operator of the AMG IDPS. We have clear, well defined and successful products under both product lines. We are in a phase of extraordinary growth as an organisation in terms of leadership, culture, innovation, recognition within the industry and profit. We have a clear vision of where we are going, and all of our employees and business partners believe in our vision. We operate as a cohesive unit in the pursuit of our goals.

We operate an essentialist mindset, we know what we are good at and we know when to say 'no' to any opportunity that isn't the right fit. If it doesn't help in the pursuit of the Strategic Vision, then we politely decline. We do not try to build a platform that has every product feature possible. We have a widely held reputation for thinking outside the box, delivering niche product features and providing advisers with services and technological solutions to drive efficiencies in their business and better outcomes for their clients.

Key Markets

We focus on three key markets being: stockbrokers, financial planners and Strategic Partnerships. Our total Funds Under Management (FUM) across all product lines have doubled years on year for the last 3 years.

We are the platform of choice for the retail stockbroking industry and have the largest share of the market. We offer a comprehensive super and investment platform, with unrivalled flexibility that seamlessly integrate with stockbrokers' businesses. Our new investment IDPS product has been extremely popular and now makes up a third of our business from this market.

We are also known right throughout the traditional financial planning industry as an exceptional platform provider. We have seen rapid growth in this market. Financial Planners now make up a considerable portion of our FUM. We are known as having the most user friendly and aesthetic adviser and member portal. And our adviser hub and additional tools are regarded as a real benefit for our advisers and an extremely compelling sales tool.

We are the go-to super fund to provide partnership master trust services for high quality investment partners. We only look to do business with the right partners that are a good fit and if the financial case is compelling. We know when to say no. We have automated the Sub-Promoter service model and how this feeds into AMG Master Trust structure through the use of data, integration and technology. This market is a key source of revenue for us and these products have good growth without us needing to be involved in the distribution. We have had rapid growth in market in the last three years.

Our greatest quality - Service

By far our greatest quality is our service. We are now rated number 1 in the industry for service by Investment Trends. We have revolutionised the client relationship service delivery model to the

adviser market. We use the latest & best technologies to deliver on-line high-quality service. We have a high degree of automation in our service model, utilising the powerful potential of our Salesforce CRM. We utilise platforms such as LinkedIn and other digital marketing to deliver more cut through and momentum than any other product provider. We use digital marketing better than any other financial services company. We spend our time looking for trends, needs and problems of our advisers, and then solving those issues for them.

Culture, people and leadership

Our culture is one of collaboration. We deeply care about our staff. They feel valued and supported in both their professional and personal life. Our leadership team are totally committed to transparency and the development of our team. They understand their primary role is to facilitate and support high performance. We know that if our people succeed, we succeed. We know personal development and success is just as important as work development and success. Our staff OKRs are made up of both business and personal goals. We have a work environment in which our people are motivated to do their very best work every day and achieve great things. Our staff are highly engaged and high performers, they love their job and working for AMG. They understand the level of performance needed to be part of the team. They care deeply about the company and their fellow staff. They know where we are going and want to be on the journey. They believe in AMG and what we stand for. People want to work for AMG, we attract the very best people in their field, and we are considered an employer of choice. We only hire people we absolutely know will be the right fit for the team. We would rather be understaffed than hire the wrong people.

We encourage entrepreneurial behaviour and reward innovation. Our staff see ideas and bring them forward. We have specific innovation teams which are highly successful with cross departmental membership. We allow people to spend time on what excites them, because this creates innovation and motivation. We have monthly idea sessions, where we are totally unplugged. We promote clear thinking time and calendar blocking techniques. Our staff understand essentialism. They know that if it does not lead directly to the attainment of our strategic vision, then it is de-prioritised. We look to eliminate inefficiencies in all that we do.

Distribution Team

“Despite being employed by AMG, our distribution team is working for our advisers, and want to get the best possible results for them.”

Our distribution team is committed to the highest quality service. They view themselves as working for our advisers, not for AMG, and want to get the best possible results for them. Our distribution team is exceptional, they understand that sales is about relationships and connecting with people is at the heart of what they do. They make it their mission to know as much as possible about all their advisers. They will be well researched before all appointments to understand our clients and what is important to them. They are genuinely interested in how to help our clients; they listen to their needs and how they can help and provide value. They do not just do a generic sales pitch, every pitch is tailored to solving the client's problem.

Our team understand digital market and the power of LinkedIn as a platform to generate leads. They use video and technology to deliver higher quality and faster service. The team works as a collaborative unit and they are widely known throughout the industry. The team has expanded to

deal with our growth. We have developed positions that cater to our unique sales model that allow us to continually evolve. New team members have in-depth training to learn our highly effective CRM, marketing and sales process.

Product Team

Our Product Team know how crucial and important they are to our success. Due to the nature of our business the product team has two core functions governance and development. Although governance is not a revenue generating function, it is our most important function. Without compliance we do not have a business. We hold ourselves to the highest compliance standards. We have a clear compliance structure and framework across both the IDPS and super products. We have automated the governance and compliance process and have a high degree of confidence in our framework.

The development function of our product team is highly efficient and effective. We have an entrepreneurial mindset. We constantly develop new ideas and it is part of our culture to challenge the status quo. We are committed to running 5-5-5 experiments (5 people, \$5K, 5 weeks) to see if we move forward with an idea. We know that we will have failure, but this is encouraged and through failure we will grow. We know that it is important to have both sprints and marathons in order to keep moving forward and collect little wins. The product team are highly effective project managers. They understand how to deliver projects and deliver quickly and accurately. This give us a big advantage of being first to market. They are masters at stakeholder management and know how to get engagement and results from our external stakeholders. The product team are constantly delivery and achieving. They know they are part of a cutting-edge team and love the feeling it gives them.

Marketing Team

Our marketing team are focused on growing our brand awareness and reputation. They are always thinking 'out of the box' to deliver marketing strategies that are unique and set us apart from our competitors. They are experts in digital marketing and social media platforms, specifically LinkedIn. They will be focused at creating content for online, webinars and events. They will become be expertise in creating video, we will utilise video heavily in our servicing and marketing. They will focus on automation of sales and service processes using, salesforce, LinkedIn and surveys.

Subcontracted Teams

We work very closely together with ESP and DDH in pursuit of our goals. Our subcontractors support our vision 100% and are committed to helping us achieve it. They know that our success equals their success. They are willing to invest in their business, knowing that if it contributes to AMG's success they will benefit in the long run. Their values are in line with ours. They have also seen extraordinary growth over the last three years and have invested in technology to allow greater efficiency, reduced cost, better service delivery and seamless integration. Their success has greatly helped AMG achieve our success.

Systems and Technology

We know that technology is the key to achieving business efficiency. We partner with the best technology partners to deliver our services in most efficient way. The relationship with our major technology partner has been very positive, the platform has transformed our business in relation to operational efficiencies, access and utilisation of data, and ability to integrate to third parties. The UI portal has delivered an adviser and member user experience that we are proud of and we continue

to develop to be at the forefront of the industry. In addition, we are constantly looking for new technologies that we can utilise or plug and play to deliver efficiencies or benefits to our clients. We have developed an automated servicing model using Salesforce. We utilise email sequencing, video messaging, milestone recognition and many other innovations.

Working arrangements / Premises

Last year we moved into a new modern work-space with collaborative areas to promote innovation and entrepreneurial thinking. We also understand how hyperconnected the modern world is and offer 'quiet unplugged' areas for staff to focus and think. Our employees love our office space and the collaboration it promotes. All of our staff are also set up to work from home. We have flexible working arrangements to let people live their best life. Staff are encouraged to work from home 1-2 days per week. We have all the technology set up to make this seamless. Our staff love the flexibility they have, and they automatically produce higher quality work because they love their job and appreciate the flexibility. We are a result focused workplace, instead of hours at your desk focused.

How we are viewed

Our members know we have their best interests at heart and always strive to keep cost down. They feel a connection with the AMG brand. They have appreciated our increased communication with them. They have noticed they are seeing our brand online now, where they have not noticed it before. When our members think of AMG, they think of trustworthy, great to deal with, flexible and simple. Our net promoter score with our members has increased by 20% in the past three years.

Our Advisers love doing business with us. We are easy to deal with and use technology to make their life easier, so they can focus on growing their business. They appreciate our innovative service model and value their relationship with their AMG relationship manager. We regularly receive positive feedback from our advisers about our service. Our advisers are our biggest fans and regularly make referrals to our team. We are known to all financial advisers in the industry. We are finding advisers contacting us, as they have seen our online presence or seen the media attention we have been receiving or heard about us through word of mouth in the industry.

Our master trust partners know that our relationship has driven exponential growth in their business. They value our relationship and our openness and inclusiveness. They love our flexibility and ability to understand what they are trying to achieve. Our business will grow with their business.

The Media regularly contact us for insights and input into stories. We are approached for speaking spots due to our different service delivery model and our success. We have become a test case for 'how to deliver smarter and innovate.'