

Media Release – 14 December 2023

New enhancements to the Expand Essential investment menu

Super, pension and investments wrap platform, Expand Essential, has had further enhancements made to its menu, to enable advisers to service an even broader range of client needs on its flagship low-cost wrap offering.

The Expand Essential platform consists of 22 high quality investment options managed by the award-winning MLC Asset Management (MLC AM) team, part of the Insignia Financial Group.

Recent additions to Expand Essential include the addition of multi-manager options *MLC MultiActive High Growth* and *MLC MultiActive Geared* which focus on efficiently generating above-inflation outcomes for longer-term investors. Both options form part of the *MLC MultiActive*¹ range of funds, formerly known as *IOOF MultiMix*.

According to Cable Rickard, General Manager Wrap Solutions and Product Integration, Insignia Financial: “We’re committed to adding complementary, contemporary, investment options to our menu and are delighted to be able to provide more choice for advisers and their clients with these changes.

“Rounding out the Expand Essential menu is the *MLC MultiSeries*² set of funds (formerly *IOOF MultiSeries*), which recently received an upgrade to Highly Recommended from ratings agency Zenith.”

In March 2023, the *MLC Real Return* and *Index Plus* funds were added to the Expand Essential menu.

Expand Essential continues to release functionality improvements to make it easier for advisers and clients. Recent enhancements delivered to benefit advisers include:

- A workflow tracker displaying the live status of any work items uploaded via the document uploader;
- An adviser dashboard summarising important upcoming activities and enhanced on-screen notifications;
- Improved trading capability with real time tax estimates and new draft order functionality which can be utilised in conjunction with enhanced permissions, providing advisers greater control of their workflow.

“As we continue to improve the functionality within Expand Essential, we have also streamlined our super to pension transfer process, released a new contributions report and uplifted a number of client reports,” said Mr Rickard.

Further enhancements to the Expand Essential menu are expected in April 2024, including a full suite of Separately Managed Accounts (SMAs), managed by MLC AM, with both value and premium options.

– Ends –

¹ Name changed as at 30 November 2023 see: <https://www.ioof.com.au/investments/products-and-services/multiactive>

² Ibid. see: <https://www.ioof.com.au/investments/products-and-services/multiseries>

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Notes to editors:

Expand products are accessible via Insignia Financial's proprietary platform. Please visit <https://myexpand.com.au/> for more information.

About Insignia Financial Ltd

Insignia Financial has been helping Australians secure their financial future since 1846. During that time, we have grown substantially to become one of the largest groups in the Australian financial services industry.

Insignia Financial provides advisers and their clients with the following services:

- **Platforms** for advisers, their clients and hundreds of employers in Australia;
- **Advice** services via our extensive network of financial advisers; and
- **Asset Management** products that are designed to suit any investor's needs.

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