



Media release

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New asset allocation tool makes super simpler for Plum members

Plum Financial Services (Plum) is launching a new asset allocation tool to help members better understand their superannuation choices.

The asset allocation tool is available to members of Plum's website and is designed to give members a better understanding what their investment choices mean.

By selecting options based on the broad range of Plum's actual investments, members can select, change and reselect options to arrive at a sample asset allocation.

According to Plum's Manager of Product and Strategy Peter Talacko, Plum identified that members wanted more information about how the different investment options stacked up in terms of actual asset allocation... but there was nothing available in the market to help them.

'We realised that the more complex your switch options, the harder it can be to determine your actual asset allocation overall without first committing to that switch,' Mr Talacko said.

'We wanted to make things easier for our members so they could more clearly understand the choices they were making.'

The tool helps both experienced investors and those with no existing knowledge of investing and asset classes, by giving them an appreciation of how a range of different investment options would look in terms of asset allocation.

'Now they can see at a glance what their different choices will equate to in terms of asset allocation, and then continue to experiment with a range of choices until they have the allocation they are after,' Mr Talacko said

'By providing our members with these tools they are better able to take control of their own financial future and make decisions to best suit their own particular financial circumstances,' he said.

more

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In addition Plum offers members an *Investor profile questionnaire* which helps determine what type of investor they are.

The sample asset allocation can be compared against investor profiles, giving members a clearer appreciation of what asset allocations are typically chosen by people with particular investor profiles - aggressive, moderate, conservative, cautious and so on.

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Further information:

For more information, photos or an interview with Peter Talacko please contact:

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About Plum

Plum Financial Services Limited ABN 35 081 812 731 AFSL 243356, a wholly owned subsidiary of MLC Limited, provides integrated superannuation solutions for medium to large Australian corporations. Purpose-built for the era of member investment choice, Plum's philosophy is about providing members with a meaningful education experience to help build their knowledge and understanding of superannuation so that they are empowered to manage their financial future.

One of Australia's fastest growing corporate superannuation providers, Plum now administers more than \$8 billion of committed assets for 82 clients and approximately 125,000 members. More information about Plum is available at www.plum.com.au.

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