

Advisers judge La Trobe Financial the best in SMSF

Tuesday 31 August 2021 – La Trobe Financial announced today that it has been judged by financial advisers nationally as the best SMSF provider in two award categories. The first award was for best **Residential Property Loan** and the second one was as the SMSF industry's leading **Innovator**. La Trobe Financial was also a Finalist for - provider of Fixed Income offerings for SMSFs. These Awards are presented by Self-Managed Super, a finance publication led by Darin Tyson-Chan and the well-known research house Core Data.

The SMSF Awards, now in its ninth year, celebrate and acknowledge the leading providers of SMSF offerings, as assessed by financial advisers who specialise in the sector. The awards were based on a survey of 585 advisers and accountants, conducted between June and July this year. Core Data's principal, Andrew Inwood, who oversaw the collection and analysis of the adviser feedback, identified that La Trobe Financial stood out for quality of service, product marketing, and in particular, the ability to efficiently and diligently process loans to SMSFs.

Inwood further commented during the awards that the COVID-19 pandemic had continued to put stress on the SMSF sector, but service providers like La Trobe Financial had maintained their high levels of delivery during these times.

La Trobe Financial's Chief Lending Officer, Cory Bannister, stated "having launched our SMSF loan in 2012, and being one of the few lenders to continue offering this product consistently without interruption during this time, we have built a sizeable portfolio of what are really "super-prime" loans. We have used this experience to refine our policy and process, and are delighted to be recognised as the best provider for our **SMSF Residential Loan**."

La Trobe Financial's Deputy CEO and Chief Investment Officer Chris Andrews commented, "we are delighted to win this prestigious award as an **SMSF Innovator**. Our asset management business has long had a focus on consistent, low-volatility income and SMSFs have been consistently strong supporters of our offerings. This award is really a tribute to the efforts of our excellent investments team. When markets turned volatile in March and April last year, they leaned in – as they always do – and provided exceptional service to all of our investors."

These awards come quickly after another set of SMSF Awards, this time hosted by the SMSF Adviser, a leading finance magazine published by Momentum Media. In these Awards, La Trobe Financial won **Best Fixed Income Provider** – yet more proof of the broad appeal of our offerings to the SMSF sector.

For seven decades, La Trobe Financial has been committed to supporting investors and we take seriously our responsibility to be good stewards of our investors' capital. With over \$6.5 billion AUM, the La Trobe Australian Credit Fund offers investments focused on capital preservation and consistent, low-volatility income. The Fund's performance in times of low interest rates continues to attract attention across the market."

About La Trobe Financial

Established in 1952 and with \$13 billion of assets under management, La Trobe Financial is one of Australia's oldest and leading credit asset managers, specialising in finance and credit investment solutions. La Trobe Financial has been a proven and trusted investment partner for institutional and retail investors, operating Australia's largest retail Credit Fund with over \$6.5 billion in assets under management and 55,000 retail investors. La Trobe Financial has over 5,100 distribution points across its two growth engines. Wealth products are distributed through 1,600 advice practices and loans are distributed through 3,500 brokers. La Trobe Financial employs 441 staff over 4 offices.

La Trobe Financial is 80% owned by Blackstone and 20% owned by management.

The Blackstone Group Inc. (together with its affiliates, "Blackstone") is one of the world's leading investment firms. Blackstone is based in New York, with 27 additional offices around the world. Blackstone's alternative asset management businesses include investment vehicles focused on private equity, real estate, hedge fund solutions, credit, secondary funds, opportunistic, growth, infrastructure, insurance solutions and life sciences. The firm was founded in 1985 by

Stephen A. Schwarzman, its current Chairman and CEO, and Peter G. Peterson. As of June 30, 2021, Blackstone employed over 3,400 people, including 185 senior managing directors and has US\$689 billion of AUM. Blackstone's 260 portfolio companies generate approximately \$136 billion in revenue and employ approximately 500,000 people.

La Trobe Financial is regulated by the Australian Securities & Investments Commission (ASIC) and holds the requisite regulatory AFSL and ACL to operate the Credit Fund, place RMBS issuances, and provide credit services.

For further details please visit our website www.latrobefinancial.com

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