



## OUR CLIENT VALUE PROPOSITION

**Connection is at the centre of our growth strategy.**

We have rebranded our group from Alexander Forbes to Alexforbes as part of a strategic shift to serve and amplify the positive impact that we have on people's lives by delivering insight and advice to both corporate clients and individual clients. This means orientating actions, decisions and intent to build a future that we can all connect with.

Our purpose and client value proposition is to pioneer **insight** to deliver **advice** and solutions that **impact** people's lives.

### INSIGHT

- Our ambition to pioneer insights is driven by the conviction that knowledge is power.
- Alexforbes wants to empower decision-making for clients that will affect their tomorrows. It is through this lens that the company wants to educate, inform and enable better choices to be made by a range of stakeholders.
- Our research reports – such as Member Insights and Alexforbes Manager Watch – are critical to how we connect with our clients and members.
- We use insight to shape employee benefits that matter.

### ADVICE

- High-quality advice leads to better decisions.
- The insights that we generate inform the advice frameworks implemented across our consulting platforms.
- Given the breadth of our consulting footprint across retirement, healthcare and investments, Alexforbes has the responsibility to ensure that the advice provided is of the highest quality to ensure that our corporate clients and individual clients can make informed decisions.
- The market is characterised by a constantly increasing flow of information, new regulations and often-conflicting opinions and beliefs. Alexforbes's ability to cut through complexity in providing expert independent advice helps our clients and members to simplify their decision-making and gain confidence in the paths chosen.

### SOLUTIONS

- Alexforbes has the capacity to build a future that delivers growth, inclusivity and sustainability based on its ability to implement the best-advice frameworks.
- Our solutions are built on our advice framework using a best-in-class philosophy where the company monitors and evaluates third-party service providers to ensure the solutions delivered to our clients and members match the best-advice mandate.
- The multi-management approach is central to the our investment philosophy. Much like finding the best solutions always starts with getting the best advice, innovative multi-management is also fundamental to our clients' success.
- We can switch service providers in or out of their solutions, based on their ability to best serve the needs of our clients and members.

## IMPACT

- With effective execution, Alexforbes has managed to reduce levels of financial stress among clients and members, produced better retirement outcomes, improved overall wellbeing and made a positive impact on society.
- Alexforbes encourages clients and members to feel in control, confident and secure in their financial journeys by making it easy for them to succeed.
- We make this impact tangible in our reporting and consulting mechanisms.