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MEDIA RELEASE

Lifestyle Asset Management Becomes the Institute of Financial Professionals Australia (IFPA) First Corporate Financial Adviser Member

Melbourne, 7 August 2025 - Lifestyle Asset Management has officially joined the Institute of Financial Professionals Australia (IFPA) as its inaugural corporate financial adviser member, marking a significant milestone for both organisations. This strategic collaboration with adviser groups is designed to deliver substantial mutual benefits, enhancing professional development and support for financial advisers nationwide.

Ky Wilson, Chief Executive Officer, IFPA stated “I am delighted to welcome Lifestyle Asset Management to our brand new corporate financial adviser membership offering. Their commitment to independent advisers perfectly complements our mission of promoting professionalism, ethical practice, and client-centred advice.”

Lifestyle Asset Management is a prominent dealer group within Australia's financial advice sector, widely recognised for its boutique-style, client-first approach. Committed to empowering independent financial advisers, the group provides comprehensive support, resources, and governance frameworks. Its extensive adviser network delivers personalised wealth management solutions, fostering professionalism and ethical standards throughout its adviser group.

Key Benefits of the Partnership

As IFPA's first corporate adviser member, Lifestyle Asset Management's advisers will gain exclusive access to a year-round comprehensive suite of Continuing Professional Development (CPD) resources. This includes all required hours in Professionalism and Ethics, Tax (Financial) Advice, with additional hours across Client Care and Practice, Regulatory Compliance and Consumer Protection, Technical Competence, and General Knowledge.



The CPD content is delivered through a structured program of live webinars, on-demand modules, and professional development events, enabling advisers to effortlessly meet their regulatory and professional obligations.

Each Lifestyle Asset Management adviser will also receive complimentary attendance at IFPA's flagship annual conference, offering additional CPD hours, insights from leading industry experts, extensive networking opportunities, and premium educational experiences.

Additionally, Lifestyle Asset Management will benefit from IFPA's Client Newsletter, a professionally written, white-labelled publication specifically designed for financial advice, accounting, and SMSF practices. Customised with the Lifestyle Asset Management brand, this quality newsletter supports advisers as trusted experts, providing ongoing value and education to their clients.

Importantly, as corporate members of IFPA, Lifestyle Asset Management advisers join a diverse and aligned community of accountants, superannuation specialists, and fellow financial advisers. This fosters meaningful connections, collaboration, and exchange of insights to strengthen practices and enhance the broader profession.

Scott Heathwood, Managing Director, Lifestyle Asset Management said "We are thrilled to partner with IFPA. This collaboration aligns with our ethos of adviser autonomy, ethical client-centric practices, and ongoing professional development. Access to IFPA's comprehensive resources including live webinars, on-demand learning, and annual conferences will significantly enhance our advisers' skills and reinforce our commitment to best-practice financial advice."

About the Institute of Financial Professionals Australia (IFPA)

The Institute of Financial Professionals Australia (IFPA) is one of the longest-standing bodies supporting the accounting and financial advice community. With a proud history dating back to 1919 originally as Taxpayers Australia, then Tax & Super Australia, IFPA has consistently supported professionals working in tax, superannuation, and financial advice. Today, we represent a vibrant network of more than 22,000 members and supporters, reflecting the strength and resilience of SME focused practices navigating constant



regulatory change. Guided by our three pillars of education, advocacy, and community, IFPA equips members with practical skills and cutting-edge knowledge through high-quality CPE programs. We advocate for fair, sensible policy reform to support SMEs, and create opportunities for professionals to connect, build lasting relationships, and share real-world insights at our events.

About Lifestyle Asset Management

Lifestyle Asset Management is a leading Australian dealer group committed to supporting independent financial advisers through tailored business solutions, robust governance frameworks, and unwavering dedication to client-centred professional standards. The group plays a pivotal role in raising the quality and integrity of financial advice.