



Broadley Rees Hogan congratulates Infocus Wealth Management on its exclusive referral arrangement with H&R Block

Infocus announces national referral relationship with one of Australia's largest accounting firms, H&R Block

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Infocus Wealth Management today announced it has entered into an exclusive referral relationship with one of Australia's largest accounting firms, H&R Block. Listed on the New York Stock Exchange (NYSE: HRB), H&R Block established operations in Australia in 1971. Today, H&R Block's Australian business sees more than 2,000 tax consultants across more than 450 offices prepare almost 800,000 tax returns annually.

The referral relationship will see H&R Block refer their clients seeking wealth management services to financial advisers licensed by the Infocus Group. This will be achieved via H&R Block engaging their clients through a dedicated call centre and direct accountant referrals; with the program managed by the Infocus Group.

Rod Bristow, Managing Director and CEO of Infocus, said "This is an exciting opportunity aligned to our vision of providing quality advice for Australians from all walks of life. It's an honour to be working with an organisation such as H&R Block, helping their clients achieve peace of mind through identifying and putting in place quality financial advice to achieve their goals", he said.

From an Infocus Group financial advisers' perspective, the H&R Block referral relationship offers unprecedented opportunity. In the initial stages of the relationship, rolling out before June 30 2017, H&R Block will be directly marketing to more than 1,000 clients every week. The aim of this will be to inform H&R Block clients of the range of value-added services that are now available to them through the relationship with Infocus. Post June 30, the program will reach full scale with the aim of informing all H&R Block clients of the opportunity to engage with a quality financial adviser licensed through the Infocus Group.

Bristow said "The H&R Block referral relationship meets our adviser value proposition of helping Infocus Group financial advisers grow revenue, increase efficiency and effectively manage risk in their businesses. Helping the extensive national network of H&R Block clients achieve their goals through quality financial advice offers Infocus Group advisers unique growth opportunities unavailable elsewhere across our industry", he said.

"H&R Block have chosen Infocus based on our national presence of quality financial advisers offering a full range of financial advice services encompassing investment, insurance and superannuation. Our in-house financial advice management software, lack of alignment to product providers, trusted brand and robust governance were also highlighted by H&R Block as key decision factors for choosing Infocus", Bristow said.

For more information, contact Rod Bristow, Managing Director and CEO, Infocus Wealth Management, 1300 463 628 or visit www.infocus.com.au

Broadley Rees Hogan (BRH Lawyers) is an independent boutique firm, specialising in corporate, commercial,

property, construction and litigation. Based in Brisbane, we act for clients across the country and internationally – **for an unassuming firm, we know how to deal big.**

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