

## Press Release - Midwinter restructures for future growth

Wednesday, 16<sup>th</sup> November 2011

Midwinter has announced that Matthew Esler has decided to depart the day-to-day operations of the Group. Esler will remain as a Non-Executive Director of Midwinter Financial Services and Midwinter has also announced his appointment as Director of Midwinter Advice Solutions, (Midwinter's paraplanning and technical services division).

As a result of the departure Midwinter has also announced the appointment of Dimitri Diamantes as Head of Technical Services, Peter Burns as Head of Distribution and has also bolstered the distribution team with the appointment of Lew Howard as Business Development Officer.

Peter Burns has worked closely with Matthew at Midwinter for over three years in his role as National Distribution Manager. Peter was formerly Head of Key Accounts at Advance Asset Management and has held various distribution and technical roles in his 25 years within the financial services industry.

Dimitri Diamantes was formerly Head of Technical Services at Zurich Australia Limited and prior to that was Technical Analyst at Advance Asset Management. Dimitri has a wealth of knowledge and experience in providing technical and strategic advice to financial planners and will be responsible for the upcoming release of AdviserTECH CPD. Dimitri has a Bachelor of Laws, Bachelor of Financial Administration (Accounting), Advanced Diploma of Financial Services, Certified Financial Planner (CFP) and is currently completing his Master of Laws.

Commenting on the changes Julian Plummer Midwinter Managing Director said, *"We have been aware of Matthew's desire to venture into funds management for some time now and that has enabled us to put in place appropriate measures, particularly with the appointments of Peter and Dimitri. This will ensure our financial adviser's continue to be provided with the high level of service they have come to expect from Midwinter"*.

Plummer said that *"When we originally brought Matthew in his goal was to establish and promote Midwinter as the pre-eminent financial planning software and services company in the market, there is no doubt that he has fully delivered on that. Midwinter is now the fastest growing financial planning software in the industry and has been consistently rated highly by our financial adviser clients. One of the unique things about Midwinter and one of the reasons we are so well liked by advisers is that the founding Directors of the business still maintain a strict watch over the programming and development of all software and software services."*

*"We thank Matthew for his contribution as an executive and look forward to continuing to work with him as a director where he will be heavily involved in the strategic and commercial decisions at the board level. Midwinter's founding directors remain fully committed to developing and supporting our next generation of financial planning software and services."*

### About Julian Plummer, Midwinter's Managing Director

The primary focus of Julian's role is to lead the development and establishment of Midwinter as the preeminent Australian financial advice technology service provider. This includes showcasing Midwinter's value proposition to licensees, practices, trustees and planners, and working with them to accelerate the growth of their businesses.

Julian has held a number of management positions within in the financial advice industry including Head of Quantitative Research for CBA/Financial Wisdom and has worked with some of largest multi-manager and superannuation funds in Australia while an asset consultant at Intech Financial Services. Julian has a Bachelor of Economics (Hons.), and completed the Chartered Financial Analyst course.

### **About Midwinter Financial Services**

Midwinter is an independent developer of cutting edge financial advice technology that assists financial advisers in providing quality advice to their clients. Midwinter's software is developed by financial planning experts — for financial advisers — focusing on delivering simple, effective, value-add solutions to financial planners and accountants. Midwinter's software has a strong emphasis on research and compliance, technical strategy implementation and advice generation.

### **For more information please contact**

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your advice just  
got a whole lot  
easier with...

 *reasonable basis*