

Insignia Financial appoints Dave Woodall as CEO Superannuation

Insignia Financial has announced the appointment of Dave Woodall as CEO Superannuation, commencing 1 November.

Mr Woodall will have end-to-end accountability for Insignia Financial's Master Trust Business, and will be responsible for product strategy, management and development, client operations, workplace solutions, sales and insurance.

Chief Executive Officer Scott Hartley said Insignia Financial has the opportunity to be a leader in superannuation and this appointment will help drive growth.

"I am excited to welcome Mr Woodall to the Insignia Financial team. His strong leadership experience and ability to drive enterprise focus and results will be an asset to the organisation as we establish our target state Master Trust strategy," said Mr Hartley.

"Insignia Financial's Master Trust business is a significant proportion of our business, as well as an area that provides a significant opportunity for profitable growth, and this is an area that Dave has a strong track record in."

Mr Woodall was most recently Chief Commercial Officer at Australian Retirement Trust (ART), where he drove the enterprise growth strategy, which included strategic partnerships and merger and acquisition activities. He was responsible for all employer segments, including corporate and institutional, regional, small-business, and government clients. In addition, he was also responsible for brand, marketing and digital acquisition. Joining Sunsuper (now ART) in 2015, Mr Woodall led the teams responsible for more than \$60 billion of new employer mandates and more than 650,000 new members across employer and consumer direct channels.

Commenting on his appointment, Mr Woodall said, "I am delighted to be joining the new Insignia Financial executive team. At a time where Australians are increasingly relying on their superannuation to deliver a comfortable retirement, I am looking forward to delivering innovative solutions, with great superannuation and retirement products.

"The organisation has significant potential, and I was attracted to the opportunity to help realise this. I look forward to the challenge and recognise the responsibility that comes with the effective management of people's retirement outcomes."

Mr Hartley added, "Dave's capabilities and deep commercial expertise will help propel the ongoing transformation of our organisation as we simplify our Master Trust business.

"This appointment, along with the recent changes to our operating model, will provide clear lines of accountability and enhanced efficiency, to ensure we are better aligned to deliver to our customers, and stakeholders both now and into the future."

This appointment is part of Insignia Financial's recently announced restructuring of its operating model and executive team, with the new structure focused on four dedicated lines of business: Asset Management, Superannuation (Master Trust), Wrap Platform, and Advice. These business lines will be supported by specialist enablement and governance functions, to ensure that each is equipped with the necessary resources, expertise and strategic oversight to achieve their objectives and maintain robust operational standards.

Following today's announcement, the Insignia Financial executive team, consisting of a mix of new and existing appointments is:

- Dave Woodall – CEO Superannuation (commencing 1 November)
- Renee Howie – Chief Customer Officer (commencing 1 November)

- Liz McCarthy – CEO MLC Expand (commencing 29 July)
- Jason Sommer – Chief Operating Officer
- Garry Mulcahy – CEO MLC Asset Management
- David Chalmers – Chief Financial Officer
- Mel Walls – Chief People Officer
- Anvij Saxena – Chief Risk Officer
- Lawrence Hastings – Chief Legal Officer
- Adrianna Bisogni – Group Company Secretary
- Frank Lombardo – Chief Technology Officer (acting), this role is currently being recruited

– ENDS –

Full biography and key achievements for Dave Woodall are attached.

Investor enquiries

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About Insignia Financial Ltd

Tracing our origins back to 1846, today the Insignia Financial Group is a leading Australian wealth manager. Our services cover a wide range of financial needs, including:

Superannuation, pension and investment platforms – as one of the largest superannuation and pension providers in Australia, we offer a number of award-winning investment solutions, used by many of Australia's largest employers and financial advisers.

Asset management – we provide access to a broad suite of investment capabilities across a range of multi-asset and single asset classes.

Financial advice – our advisers offer coaching, guidance and advice based on clients' needs.

Further information can be found at www.insigniafinancial.com.au.

Executive biography



Dave Woodall

CEO Superannuation

Commencing 1 November 2024

Mr. Woodall has more than 30 years' experience in the financial services industry. He has led teams across several disciplines, including sales, relationship management, financial advice, marketing, brand and communications and has worked for NAB, Plum, ING and AMP. Most recently he was Chief Commercial Officer at Australian Retirement Trust (ART), where he was responsible for several areas including employer growth across corporate and institutional, regional, small-business and government customer segments, as well as strategic partnerships

brand, marketing and digital, and an industry-leading payroll distribution platform. He is a member of the Australian Institute of Company Directors.