

MEDIA RELEASE

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La Trobe Financial 12 Month Term Account joins BT Panorama

La Trobe Financial is pleased to announce the availability of its 12 Month Term Account on the BT Panorama investment menu. With a strategy of investing in Australian Real Estate Private Credit, and now at c.\$8.5 billion in AUM, the investment option enjoys support from across the market, including over 3,700 financial advisers.

Following significant adviser demand, joining the BT Panorama investment menu continues the ongoing path of growth for the strategy. La Trobe Financial Chief Investment Officer, Chris Paton, stated: "We are excited to confirm the inclusion of our 12 Month Term Account onto the BT Panorama investment menu.

"As a strategy with a 22-year track record of zero investor losses and flawless liquidity management, we are pleased to make the 12 Month Term Account available to more investors and advisors."¹

The addition gives Australia's financial advisers access to a wider range of products. La Trobe Financial Head of Distribution, Michael Watson, added: "The addition meets significant demand from within our 3,700-strong adviser network. This means that our 12 Month Term Account is now on the investment menus of all major investment platforms. We are looking forward to continuing to work closely with BT and advisers across the market."

The 12 Month Term Account (APIR: LTC0002AU) has been made available on BT Panorama for IDPS investors, and for Superannuation investors with a holding limit of 20%.

In welcoming the addition, BT's Head of Distribution Jason Brown commented: "With around \$136 billion in Funds Under Administration and 345,500 customer accounts on BT's platforms, we can see and understand real-time trends in asset allocations across a large segment of advised clients. A clear repositioning towards defensive income assets that have the potential to deliver a real income return is underway. We are always looking to expand our investment menu and recognise there is demand for exposure to Australia's real estate private credit. The addition of La Trobe Financial's 12 Month Term Account to BT Panorama supports this."

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About La Trobe Financial

La Trobe Financial is Australia's premier alternative asset manager and a proven and trusted investment partner for institutional and retail investors with over A\$20 billion AUM.

¹ Performance data is available on Morningstar: <https://www.morningstar.com.au/investments/security/fund/14260/performance>.

Established in 1952, La Trobe Financial has been building the wealth of its investors across seven decades through careful attention to quality, discipline and consistent performance across the economic cycle.

Today, La Trobe Financial manages assets on behalf of over 100,000 investors[^] – including some of the world’s largest financial institutions – and 3,700 supporting financial advisers.

La Trobe Financial’s retail asset management business is spearheaded by the c.\$11bn Credit Fund, the largest retail credit fund across Australia. Its flagship 12 Month Term Account has been recognised as “Best Credit Fund – Mortgages” for 15 consecutive years by *Money* magazine, and is consistently recognised as one of Australia’s fastest growing funds (per Rainmaker) across the Australian wealth management industry.*

To find out more visit www.latrobefinancial.com.au

About BT Financial Group

With more than half of Australian advisers using BT Panorama,** BT is a leader in the wealth management industry. BT’s vision is to enable quality financial advice to thrive.

BT comprises a group of companies that are subsidiaries of Westpac Banking Corporation ABN 33 007 457 141 AFSL and Australian credit licence 233714 (Westpac). Apart from any interest in Westpac products acquired through BT superannuation or investments, an investment in, or acquired using any of BT’s products is not an investment in, deposit with or any other liability of Westpac or any other Westpac Group company.

** According to Investment Trends’ May 2024 Adviser Technology Needs Report.

Disclaimer – La Trobe Financial

La Trobe Financial is regulated by the Australian Securities & Investments Commission (ASIC) and holds the requisite regulatory AFSL and ACL to operate managed investment schemes, place RMBS issuances, and provide credit services.

La Trobe Financial Asset Management Limited ACN 007 332 363 Australian Financial Services Licence 222213 Australian Credit Licence 222213 is the responsible entity of the La Trobe Australian Credit Fund ARSN 088 178 321. It is important for you to consider the Product Disclosure Statement (**PDS**) before deciding whether to invest, or to continue to invest, in the fund. The PDS and Target Market Determination are available on our website.

[^] Total investors is calculated by adding all individual & joint investors (which includes some investors with a current zero balance in their account) to reasonable estimates of investors investing via platform, trusts or SMSFs.

La Trobe Financial Services Pty Limited ACN 006 479 527 Australian Credit Licence 392385.

*To view our Awards and Ratings please visit the Awards and Ratings page on our [website](#).

Past performance is not a reliable indicator of future performance.