



NEWS RELEASE

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Perpetual Asset Management Recognized as an MMI/Barron's Industry Award Finalist 2023

Trailblazing 'Practice Management' program aims to holistically fortify the health and well-being of financial advisors to enhance personal health and professional effectiveness.

CHICAGO, September 20, 2023: Perpetual Asset Management (Americas) ("Perpetual") (ASX:PPT) has been named a finalist in the 2023 MMI/Barron's Industry Awards "Doing Good" category for our unique practice management program, *Perpetual Pathways: Embracing Wellness for Peak Performance*. Understanding that financial advisors are the bedrock of the financial services industry, this program is comprised of a series of tools and practices designed to boost advisor energy, productivity, and satisfaction while fortifying health and general well-being, ultimately contributing to superior client service.

The annual MMI/Barron's awards recognize innovation and leadership in the investment advisory solutions industry. Its 15th year, the awards celebrate outstanding achievement and honor firms that have raised the bar by delivering superior solutions for financial advisors and investors over the past year.

Perpetual is among three finalists in the "Doing Good" category, honoring programs that support a deserving cause or give back to the communities MMI and Barron's serves.

"What really sets Perpetual's program apart is its commitment to sustained transformation," says Gabriella Mengstab, Senior National Accounts Manager and wellness enthusiast who created and delivers the program. "It's not a one-off event but a holistic approach that integrates nutritional guidance, stress management techniques, sleep optimization, hydration, and spiritual fitness."

Since launching the program in January of 2023, Gabriella has delivered its various components to more than 3,000 financial advisors across the country. Participants have

reported significant, tangible improvements in their wellbeing, including healthier sleep patterns, notable weight loss, enhanced mental clarity, and palpable increases in energy levels.

“The intent is for *Perpetual Pathways* to extend beyond individual wellness, creating ripple effects that reach the clients and broader communities these advisors touch,” says Mengstab. “Participants have reported newfound vigor and healthier outlooks that make them feel better equipped to serve their clients, and that, I believe, raises the bar for the entire industry.”

“Thank you MMI and Barron’s for this recognition,” said Mickey Janvier, Head of Distribution for Perpetual (Americas). “And many thanks to Gaby for her willingness to share her expertise and passion around wellness with the advisor community.”

Award winners will be announced at the 2023 MMI Annual Conference, held October 11 – 13 in Austin, Texas, at the Omni Barton Creek Resort & Spa. Winners will be determined by an online vote of designated contacts at each MMI member firm to ensure all member firms are equally represented in the final voting process.

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About Perpetual

Perpetual Ltd., founded in 1886 and one of Australia's largest wealth managers, is a diversified financial services company providing specialized investment management, wealth advice and corporate fiduciary services. In the US, Perpetual brings a broad range of unique and high-quality investment strategies to clients through its sophisticated distribution strategies and partnership with its boutiques: Barrow Hanley Global Investors, J O Hambro Capital Management (and JOHCM (USA)), Regnan, Trillium Asset Management, and Thompson, Siegel & Walmsley (TSW).

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