

MEDIA RELEASE

Cardena Private Wealth expands client service with launch of new integrated insurance offering

Tuesday April 17, 2018. Boutique wealth management and advisory firm Cardena Private Wealth* (Cardena) Director Jonathan Kilborn has announced the expansion of the organisation's client offering with the addition of life insurance protection to provide a more holistic advice service.

The insurance offering is the culmination of an extensive alliance with specialist risk consultancy MBS Insurance that has been providing personal insurance and related consultancy services to Cardena clients over the past 12 months.

"From the beginning, the Cardena-MBS Insurance relationship had many synergies, and I couldn't be more excited about the new formal alliance outcome", said Jonathan Kilborn.

"For Cardena, it was an acknowledgement that personal insurance is very much a highly specialist and complex area that requires expert guidance to navigate the numerous providers, offerings, variations and options required to address the specific individual needs of HNW families, professionals and business owner clients".

"Hence it was important to partner with a personal insurance specialist with a proven track record of providing expert personal insurance advice and end-to-end support from underwriting to processing claims – MBS Insurance ticked all the boxes", affirmed Jonathan Kilborn.

Since its inception, Sydney headquartered Cardena has operated as a client centric boutique wealth management and advisory firm providing personalised wealth management strategies for each client based on a detailed understanding of their specific situation, objectives and wealth accumulation aspirations.

As part of Cardena's commitment to putting clients first, the organisation has built a network of best-in-breed professionals and strategic partners to ensure its capability to offer market-leading technology and financial solutions to meet clients' needs.

These strategic partners include estate planners, tax specialists, asset consultants and expert portfolio and investment managers, providers of leading technology platforms to administer and report on investments – and now life insurance via MBS Insurance.

*Cardena Private Wealth and its advisers are Authorised Representatives of Fortnum Private Wealth Ltd
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MBS Insurance is also based in Sydney and began its operations in 2006. Over the years it has grown steadily through adherence to the highest standards of best practice, customer service, compliance and dedication to developing a focussed and specialised business infrastructure to provide a comprehensive risk offering to clients.

Today MBS has a well-deserved reputation as one of Australia’s leading and premier client focussed risk insurance business advisory firms.

“We are very proud of MBS’s reputation and the opportunity for our highly experienced team of risk insurance advisers and talented operational staff to assist Cardena service the life insurance needs of their clients”, said MBS Director Kris Mason.

The MBS Insurance Cardena alliance will enhance Cardena’s marketplace and client offering with more inclusive integrated insurance offering that includes business continuity insurance, income protection insurance, trauma, life, TPD cover; both at an individual level and also group risk protection for companies who want to protect their staff.

Jonathan Kilborn concluded, “Protecting wealth and financial aspirations against unforeseen contingencies is just as important as accumulating it, that’s why insurance is so important to a financial strategy.

“We’re excited about the launch of the alliance and delighted to be able to provide personal insurance as an important component of a holistic advice offering dedicated to addressing the individual needs and objectives of Cardena clients”.

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**Issued jointly by Cardena Private Wealth www.cardena.com.au
&
MBS Insurance www.mbsinsurance.com.au**

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Notes to the editor:

Pictured Jonathan Kilborn
Director Cardena Private Wealth