



Terms and Conditions

General

1. Iress Limited ABN 47 060 313 359 (“**Iress**”) will conduct a prize competition (“**the Competition**”) according to these terms and conditions. By participating in the Competition, all entrants agree to these terms and conditions.

Competition Period

2. The Competition commences on Thursday 16 November 2023 at 06:00 (AEST). All submissions must be completed by 17:00 (AEST) on Friday 8 December 2023. The Winner will be notified by 17:00 (AEST) on Thursday 14 December 2023.

Entry Criteria/How to Enter

3. Entry to the Competition is open to Australian Financial Planners and Paraplanners over the age of 18 years (“**Eligible Entrants**”) with a valid email address. There is no entry fee for the Competition.
4. To enter, Eligible Entrants must register their email for the Advisely website and submit a question via the “Ask an Expert” section of the Advisely website (“**the Question**”) by 17:00 (AEST) on Friday 8 December 2023. Whilst there is no limit on the number of Ask an Expert questions an Entrant can ask, a limit of one entry to this Competition applies per person.

Competition/Judging Criteria

5. To be selected as the Winner, the Eligible Entrant must post the Question that is deemed most compelling and consequential for financial advisers more broadly to improve their efficiency. The Question(s) will be individually judged based on the creative merit.
6. One entry will be selected by a judge or a number of judges appointed by Iress in their absolute discretion as per the criteria set out in clause 5, as the winning entry at 1/10 Shelley Street, Sydney. The Eligible Entrant who submitted the winning entry (“**the Winner**”) will receive a Prize as defined in clause 9.
7. This is a game of skill and chance plays no part in determining the Winner. Each entry will be judged individually on its merits as per the criteria set out in clause 5.

Prize (Description & Conditions)

8. The Winner will be notified by telephone call or email that they have won the Competition by 17:00 (AEST) on Thursday 14 December 2023 and will be required to confirm they satisfy the definition of Eligible Entrant.
9. The prize comprises of consultancy services provided by Business Health Pty Ltd, The Cyber Collective Pty Ltd, Practice Dynamix Pty Ltd, Striver Pty Ltd and Tangelo Advice Consulting Pty Ltd (collectively known as **Advisely Experts**) as follows (“**the Prize**”):
 - a. Practice operations deep-dive with a HealthCheck, Benchmarker, client CATScan and 1 hour one-on-one debrief with the Business Health
 - b. Cybersecurity review of your current processes, people with The Cyber Collective Team to highlight key areas of potential cyber risk



- c. Advice systems bootcamp with the Practice Dynamix team to optimise your Xplan setup for maximum efficiency in your day to day operations
 - d. Talent strategy consult with the Striver team to help you optimise your people plan, both for your current team and future talent
 - e. Compliance and advice process review 2-hour session with Tangelo Advice Consulting to review one of your key processes to find efficiency opportunities
10. The Prize will be delivered to the Winner either in person with each of the consultants mentioned or by way of video call, and is available to be taken by the Winner through mutual agreement on timings by 30 November 2024 (“the **Prize Expiry Date**”).
11. If:
- a. Iress does not hear from the Winner within 10 days of notification of winning in accordance with clause 8;
 - b. the individual identified as the Winner is thereafter deemed as not an Eligible Entrant;
 - c. the Winner opts out of receiving the Prize; or
 - d. the Winner does not redeem the Prize by the Prize Expiry Date,
- the Winner’s prize will be forfeited and Iress will be entitled to select another Winner in accordance with the process described above.
12. The Prize has a value of approximately \$5,160 AUD (“the **Prize Value**”).
13. Iress is not responsible or liable for any loss, damage or injury suffered by any Winner as arising from, or in connection with the Prize.
14. Iress is not responsible for any terms and conditions that are associated directly with the use of the Prize.
15. The Prize must be taken as stated (including, where applicable, being able to use the Prize before the Prize Expiry Date), and no compensation will be payable if a winner is unable to use the prize as stated.
16. The Prize is not exchangeable for other goods and services and cannot be redeemed for cash.

Privacy

17. Eligible Entrants’ personal information will be collected, used, and disclosed in accordance with the Terms of Use and Iress Privacy Policy which the Eligible Entrant has consented to as part of signing up to the Advisely website.
18. A copy of the Iress Privacy Policy is available at <https://www.iress.com/resources/legal/privacy-policy/>. Eligible Entrants should note that this URL may be subject to change but the Iress Privacy Policy will always be found on the Legal section of the Iress website (Australia).
19. By entering the Competition, Eligible Entrants agree to participate in any public relations arranged by Iress, including but not limited to Iress using their name, likeness, image,



recording and/or voice in any media platform for an unlimited period of time without payment of royalties or commission to the Eligible Entrant.

Iress' Rights

20. By entering the Competition, Eligible Entrants grant Iress a non-exclusive licence to use the content of their entry in any way Iress wishes without payment of royalties or commission to the Eligible Entrant.
21. By entering the Competition, Eligible Entrants warrant that their submission is not in breach of any third party intellectual property rights, and agree to indemnify Iress with respect to any IP claims brought by a third party against Iress alleging that the Eligible Entrant's submission infringes any copyright, design or trade mark intellectual property rights.
22. Iress reserves the right to exclude or disqualify any Eligible Entrant's submission that is not in accordance with these terms and conditions, or at Iress' discretion.

Winner's Rights

23. The Winner has rights under the Australian Consumer Guarantees Act and other similar legislation which cannot be excluded, restricted or modified by these terms and conditions, or by Iress generally.
24. Notwithstanding clause 19, to the extent that it is permitted to do so under law, Iress excludes all liability arising in tort, contract or otherwise for any injury, loss or damage whether direct, indirect, special or consequential, arising in any way out of the Competition.