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- [Join AdviserVoice](#)
- [Login](#)
- [News](#)
  - [Community](#)
  - [Economic Update](#)
  - [Events](#)
  - [From the Source](#)
  - [Industry Bodies](#)
  - [Regulation/Reform](#)
  - [Trends + Ratings](#)
  - [White Papers](#)
- [CPD Areas](#)
  - [Professionalism & Ethics](#)
  - [Regulatory Compliance & Consumer Protection](#)
  - [Client Care & Practice](#)
  - [Technical](#)
  - [General](#)
  - [Tax \(Financial\) Advice](#)
- [Investing](#)
  - [AdviserVoice/Zurich Risk CPD](#)
  - [Aged Care](#)
  - [Asian Investing](#)
  - [Economics](#)
  - [Estate Planning](#)
  - [ETF](#)
  - [Insurance](#)
  - [Investment](#)
  - [Mortgage Broking](#)
  - [SMSF](#)
  - [Superannuation](#)
  - [Sustainable Investing](#)
  - [Taxation](#)
- [Business Excellence](#)
  - [Best Practice](#)
  - [Business Growth](#)
  - [Client Insights](#)
  - [FinTech](#)
  - [Thought Leadership](#)
  - [Top Tips](#)
- [Resources](#)
  - [Products](#)
  - [Services](#)

- [Useful Links](#)

## From the Source

You are in [News + Outlook](#) / [From the Source](#) / Perpetual acquires Priority Life, strengthening its risk advisory capability for private clients

# Perpetual acquires Priority Life, strengthening its risk advisory capability for private clients

28 Nov 2019

From [Perpetual Private](#)



Mark Smith

**Perpetual Limited (Perpetual) has announced the acquisition of Priority Life, a Melbourne-based specialist risk advisory business with a strong focus on medical practitioners, professionals and business owners.**

Commenting on the acquisition, Mark Smith, Group Executive for Perpetual Private, said: “This acquisition demonstrates our commitment to growing our private client business through strengthening our proposition to high net worth clients including established wealthy, business owners, and medical specialists.

“As the industry continues to evolve, Perpetual Private is uniquely positioned to benefit from industry dislocation given its trusted brand and deep client relationships. As a business, we are looking to lead the market in wealth advisory, trustee and professional services in our targeted client segments. Our team is focused on accelerating growth through attracting high quality and strategically aligned advisers, with 15 new advisers signing on for FY20, as well as growth through inorganic opportunities.

“Priority Life fits well with our integrated professional services model, which facilitates deeper client engagement through a holistic approach, enabling clients to gain access to a team of specialists. This acquisition is aligned with our objectives as we are both focused on meeting the ever-changing needs of our clients. Priority Life’s success is founded on a deep understanding of the specific needs of their clients and complex insurance issues which is a valuable addition to our own capabilities. Our current and future clients will benefit from Priority Life’s highly focused expertise in life insurance solutions.”

Both Priority Life and Perpetual are committed to growing the business and expanding service offerings and capabilities to clients.

David Davidson, Managing Partner of Priority Life, said: “We are pleased our clients will have the opportunity to access Perpetual’s suite of service offerings including financial advice, investment management, retirement planning, and philanthropy.

“For Priority Life, it’s also about setting ourselves up for the future and ensuring the financial well-being and needs of our clients are taken care of.

Perpetual's deep trustee heritage and financial advice client relationships across multiple generations are key strengths of the Perpetual Private business and clients are looking for a trusted brand and quality advice model now more than ever."

Tags: [Mark Smith](#)

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