WT | FINANCIAL GROUP

ASX Announcement – 1 September 2026

WT FINANCIAL GROUP EXECUTES BINDING AGREEMENT TO ACQUIRE 70% OF TNT ADVISOR SOLUTIONS

WT Financial Group Limited (ASX: WTL) (**WTL** or **the Company**) is pleased to announce that it has executed a binding agreement to acquire a 70% interest in TNT Advisor Solutions (**TNT**), an established Australian provider of premium, onshore paraplanning services.

The investment represents an evolution of WTL's strategy of building an ecosystem around privately owned advice practices — partnering with successful entrepreneurs while investing in capabilities that can help advice businesses grow, build capacity and operate more efficiently.

TNT's founders, Tamara Morey and Tanya Higgins, together with CEO Dela Dzadey, will collectively retain 30% and remain actively involved in the business. Ms Dzadey will continue to lead TNT on return from maternity leave, supported by the existing management and paraplanning team.

Building the WTL ecosystem — and backing TNT

WTL Managing Director Keith Cullen said advice practices increasingly need access to scalable specialist capabilities, including high-quality outsourced services as an alternative to adding fixed internal resources.

"The best businesses in financial advice are built by entrepreneurs who remain close to their people and clients. Our job is not to take that away. It is to give them access to resources and opportunities that become possible through greater scale.

"Tanya, Tamara, Dela and the TNT team have built an outstanding business with a clear philosophy about what great paraplanning should look like. Our role is to back them with access to capital, technology and broader markets and help them take an already great business to the next level.

"TNT is a very good example of our partnership philosophy in action and of the broader ecosystem of capabilities we intend to build around the advice practices we support," Mr Cullen said.

TNT co-founder Tamara Morey said the partnership would allow TNT to pursue its growth ambitions while preserving the qualities that had underpinned its success.

"Tanya, Dela and I are incredibly proud of the business and team we have built, and it was very important to us that the next stage of TNT's growth built on those foundations.

"Partnering with WTL provides access to additional capital, technology capability and a broader market, while allowing TNT to remain TNT — focused on our people, our clients and providing exceptional Australian-based paraplanning."

A race to the top

Mr Cullen said WTL expects demand for flexible outsourced paraplanning capacity to increase as advice practices seek to grow and scale their operations.

"For many years, parts of the paraplanning industry have been engaged in a race to the bottom on price, often accompanied by declining quality and increasing reliance on offshore document production. Emerging technologies are turning that model on its head and creating a race to the top — in quality, efficiency, responsiveness and turnaround times."

Ms Morey said TNT's approach to technology would remain centred on enhancing the capability of experienced paraplanners rather than replacing them.

"We don't see technology replacing great paraplanners. We see it making great paraplanners even better. The real value of an experienced paraplanner is their technical knowledge, judgement and ability to understand an adviser's strategy and act as a genuine second chair.

"As automation and AI remove more of the repetitive document production, formatting and checking work, our people can spend more time applying those higher-value skills — while delivering better quality, consistency and turnaround times for our clients."

Transaction terms

The consideration for the 70% interest is $2.43 million and values TNT at $3.48 million, based on 4.5 times normalised EBITDA. The acquisition will be funded from WTL's existing cash holdings.

WTL has agreed to acquire its interest directly or through a nominated related entity. WTL is continuing to consider the optimal long-term holding structure, including potential participation by WTL & MWP Investco Pty Ltd. This does not affect WTL's commitment to, or funding of, the transaction.

Completion is expected shortly, subject to satisfaction of the remaining completion requirements.

Business as usual — with greater resources

TNT will retain its identity, management team, client relationships and commitment to premium onshore paraplanning, continuing to serve practices across all licensee groups — large and small — and the self-licensed market.

The partnership will provide TNT with additional resources to expand its experienced Australian paraplanner base, invest in technology and workflow capability, and support more advice practices as they scale.

"Our shared ambition is to support Dela, Tanya, Tamara and their team in building TNT into Australia's preeminent, genuinely world-class paraplanning service — combining exceptional people, exceptional technology and exceptional service," Mr Cullen said.

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About WT Financial Group Limited

WT Financial Group Limited (ASX: WTL) has established itself as one of the largest financial adviser networks in Australia. Its wealth management, retirement planning, and personal risk insurance advice services are delivered primarily through a group of around 400 privately-owned advice practices whose advisers operate as authorised representatives under its Wealth Today, Sentry Advice, Synchron Advice, and Millennium3 subsidiaries.

The Group's Wealth Adviser division acts as the Company's central services hub and also offers market-leading support, training, and financial literacy resources — including over 100 financial handbooks and manuals — to advisers and clients both within and outside WTL's network.

Through WTL & MWP Investco Pty Ltd, WTL's joint venture with Merchant Wealth Partners, the Company is pioneering a new growth model for financial advice practices by providing long-term, non-controlling capital that enables corporatisation, consolidation, and expansion.

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