

Generation Life wins Overall Investment Bond Excellence Award for 2020

Release Date: 22 October 2020

Generation Life is the winner of the Overall Investment Bond Excellence Award for 2020, announced by Plan For Life, Actuaries & Researchers on Thursday, 22 October 2020.

The first annual Investment Bond Excellence Awards recognise excellence in the key facets of the products, based on a holistic benchmarking review which includes financial strengths, marketing strengths, product benefits, service to customers and support and training of advisers.

The Investment Bond Award went to CommInsure (Investment Growth Bond) and the Education Bond Award went to Futurity Investment Group (Futurity Education Bond).

Bond - Estate Planning Award went to Generation Life (LifeBuilder EstatePlanner) and Bond - Child Policy Award went to Generation Life (ChildBuilder).

The Funeral Bond Award went to Australian Unity (FuneralPlan Bond).

The Adviser Support Award which is based on a review of the types of training and support facilities provided by each organisation, went to Australian Unity.

The Customer Service Award which is based on the service provided to customers through facilities such as annual reporting and client access to portals, went to Futurity Investment Group.

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Summary of Investment Bond Awards – Winners and Finalists

Overall Investment Bond Excellence

Winner	Generation Life
Finalist	Australian Unity
Finalist	CommInsure
Finalist	Futurity Investment Group

Investment Bond

Winner	CommInsure	Investment Growth Bond
Finalist	Australian Unity	Lifeplan Investment Bond
Finalist	Generation Life	LifeBuilder

Education Bond

Winner	Futurity Investment Group	Futurity Education Bond
Finalist	Australian Unity	Lifeplan Education Bond

Bond - Estate Planning

Winner	Generation Life	LifeBuilder EstatePlanner
Finalist	Australian Unity	Bond - Estate Planning
Finalist	CommInsure	Bond - Estate Planning
Finalist	Futurity Investment Group	Bond - Estate Planning

Bond - Child Policy

Winner	Generation Life	ChildBuilder
Finalist	Australian Unity	Lifeplan Child
Finalist	CommInsure	Child Advancement Policy

Funeral Bond

Winner	Australian Unity	FuneralPlan Bond
Finalist	Generation Life	FuneralBond

Adviser Support

Winner	Australian Unity
Finalist	CommInsure
Finalist	Futurity Investment Group
Finalist	Generation Life

Customer Service

Winner	Futurity Investment Group
Finalist	Australian Unity
Finalist	CommInsure
Finalist	Generation Life

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About the Media Release

The Media Release is provided by Plan For Life, Actuaries and Researchers, previously branded as "Strategic Insight". Plan For Life are specialists in providing accurate statistical information and analyses covering the financial services, funds management and life insurance markets. Asset International Australia Pty Ltd is the legal entity name for Plan For Life. Plan For Life is an ISS Market Intelligence (ISS MI) brand. ISS MI is a division of Institutional Shareholder Services (ISS).

Data Collection and Estimation Techniques

Data is collected from companies in the managed funds market covering funds under management, gross inflows, gross outflows, net inflows unit prices and investment return rates. Gross Inflows represents an indication of new business sales. Data is thoroughly checked and queries are raised with data providers if data is significantly different from trends or compared to other companies. Where inflow or outflow data is unavailable, we make estimates based on market behaviour from similar investments in compatible markets. When companies provide actual inflow and outflow data these replace estimates. This estimation procedure, coupled with our rigorous direct data collection, enables us to prepare high quality, reasonable and comprehensive data for every Manager.

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