

9 September 2021

## Equity Trustees appointed RE to Haven Wealth Partners

Equity Trustees has been appointed as a responsible entity for Haven Wealth Partners, which has launched its first fund in the Australian market with a focus on 'deep green', ethical investing.

The Haven Wealth Partners Ethical Absolute Return Fund is a value-focused ethical absolute return fund, which applies stringent positive and negative screens to its investments in companies that contribute to making a 'significant change for the better'.

Russell Beasley, Executive General Manager, Corporate Trustee Services, Equity Trustees, said: "We are delighted to be involved in the launch of this exciting new fund, which we believe will help to meet demand from investors for ethical portfolio solutions.

"Having an independent specialist RE can bring decades of experience, ensuring the fund meets compliance and governance requirements. It gives fund managers the confidence to focus on the commercial investment decisions and marketing the product, while we take care of the rest."

Nick Heuzenroeder, Managing Director and co-founder of Haven Wealth Partners said the fund launch was in response to strong demand from a rising number of ethical-focused investors seeking an investment that aligned with their personal and religious beliefs.

"Our goal was to create a fund which makes a genuine difference to society, by limiting global warming and investing in areas such as renewable energy, healthcare and technology – while avoiding areas that are harmful to society.

"There are many products on the Australian market which claim to be ESG-focused, but we wanted to take it one step further by creating a 'deep green' fund that is as ethical as it can be and can be used as a core portfolio solution by investing across different asset classes."

The Fund is available to retail, wholesale and institutional investors and has already received significant interest, as demand for sustainable investments continues to grow.

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### MEDIA INQUIRIES

Alicia Kokocinski  
General Manager – Marketing & Communications  
+61 03 8623 5396 / +61 403 172 024  
[akokocinski@egt.com.au](mailto:akokocinski@egt.com.au)

Equity Trustees is the brand name of EQT Holdings Limited (ABN 22 607 797 615) and its subsidiary companies, publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane, Perth, London and Dublin.

Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers.