

A premier league
investment solution,
open to everyone.



partnering with
BlackRock.

Schroders

J.P.Morgan
ASSET MANAGEMENT

OpenInvest[™]
Choose confidence

OpenInvest - Knowledge, choice, and control.

We empower you to choose how your wealth is managed, providing direct access to portfolios designed to meet the needs of investors seeking diversification, security, income, and growth.

Knowledge is power. Everyone makes better decisions with more information and more time to process it.

Life is about choices.

The OpenInvest online marketplace gives you unprecedented access to a menu of leading Investment Management companies and their extensive resources.

Control breeds confidence.

We want you to feel completely comfortable at all stages of your investment experience. Take your time getting to know the different Investment Managers and choose one when you're ready.

Who's making the investment decisions?

OpenInvest gives you game-changing access to portfolios managed by some of the world's leading Investment Management companies, making it easier for you to grow your wealth.

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What types of investments make up the portfolio?

As these are diversified portfolios, they include a range of investments, from shares to ETFs to managed funds, spread across companies, industry sectors, regions, countries and asset classes to give you the best chance of meeting your investment goals.

Who administers the portfolio?

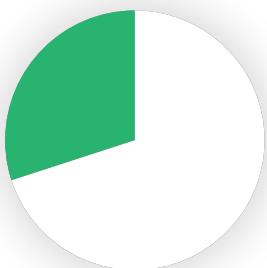
OpenInvest handles all of the complex administration involved in investing, on your behalf: transacting, performance reporting, preparation of tax reports, and record keeping. So you can relax, safe in the knowledge that we're looking after this bit of life admin.

- ✓ Administration
- ✓ Reporting
- ✓ Transactions
- ✓ Legal Compliance
- ✓ Record Keeping

What portfolios can I choose from?

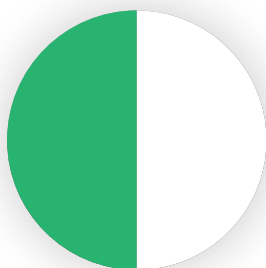
Each Investment Manager offers four model portfolios from mainly income-focused to more growth-focused.

DEFENSIVE INCOME



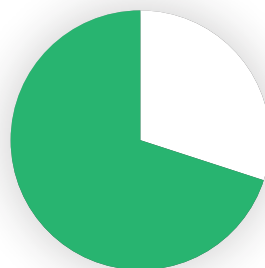
Typically consists of 70% Defensive assets and 30% Growth assets.

SUSTAINABLE INCOME



Typically consists of 50% Defensive assets and 50% Growth assets.

ROBUST GROWTH



Typically consists of 30% Defensive assets and 70% Growth assets.

MAXIMUM GROWTH



Typically consists of 10% Defensive assets and 90% Growth assets.

We speak your language.

OpenInvest has been built by investors for investors on three pillars:

- ▶ Transparency – nothing is hidden in the fine print;
- ▶ Integrity – we have no conflicts of interest and will never favour any Investment Manager over another; and
- ▶ Plain language – we're committed to being clear, succinct, and jargon-free.

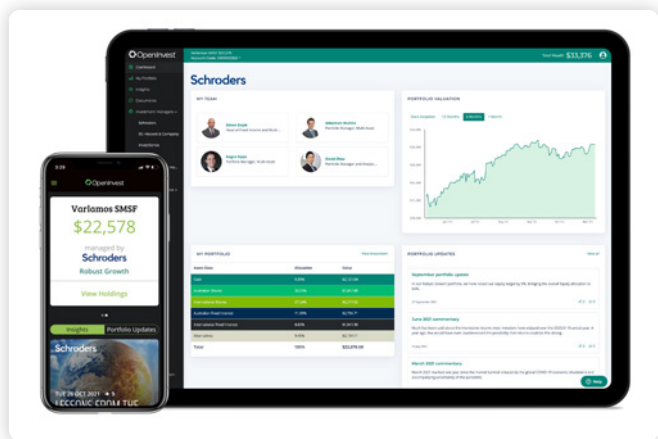
Fees that are open and honest.

Simple and transparent fees because what you pay to invest should never come as a surprise.

Our philosophy is to provide you with an open and transparent menu, giving you a choice of high-quality Investment Managers – so you can find one that aligns with your values and investment needs – accompanied by a consistent flow of relevant information.

How do I monitor my investments?

Access your portfolio on the go with your online portal and our mobile app, giving you complete visibility of your portfolio 24 hours a day, 7 days a week.



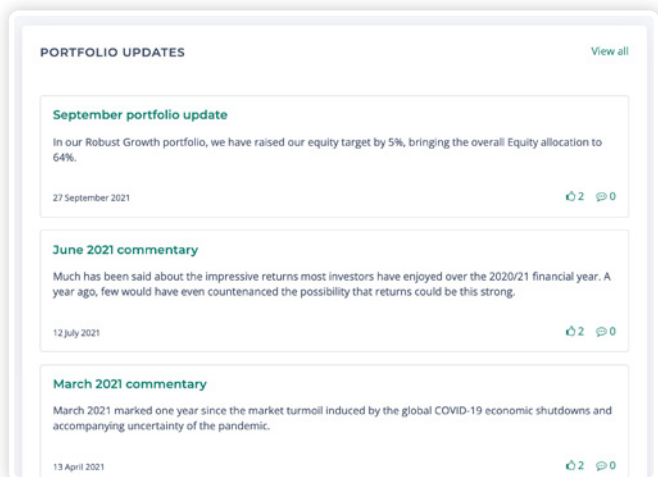
How can I see what I own?

There's a detailed breakdown of all investments in your portfolio, how much they cost and what they're worth.

Asset Class	Allocation	Value
Cash	9.39%	\$2,121.04
Australian Shares	33.03%	\$7,457.80
International Shares	27.54%	\$6,217.02
Australian Fixed Interest	11.99%	\$2,706.71
International Fixed Interest	8.60%	\$1,941.90
Alternatives	9.45%	\$2,134.11
Total	100%	\$22,578.58

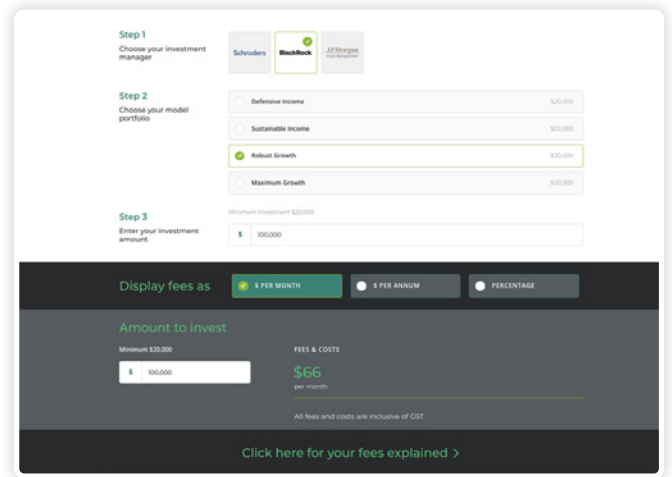
How am I kept informed?

Your chosen Investment Manager will regularly provide content updates, explaining how they're thinking, what they're investing in, and why you own what you own.



How much do I pay?

Our fees philosophy, like everything else on our platform, represents openness and transparency. So, your fee is simple, clear and easy-to-understand.



Our door is always open.

OpenInvest offers you general information about investing and a series of behavioural quizzes to help you better understand your investing personality and capabilities, in our Learning Centre.

There's also a steady flow of Insights from all of our Investment Managers on a wide variety of investing topics, so that you can not only gain a broader understanding of the world of investing, but also see how each Investment Manager views the landscape.

While we've given you a simple way to engage with leading Investment Management companies and choose one to manage your portfolio, we appreciate that you might still like some help using the OpenInvest solution.

Contact us

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Email: enquiries@openinvest.com.au

Chat: www.openinvest.com.au

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