



Help your clients find a better investment portfolio... ...so they sleep easier at night.

Do your self-directed SMSF clients need help with their investment portfolio?
Do they understand the importance of diversification, but struggle to achieve this?

Research shows most self-directed SMSF trustees need and want help with their investment portfolios. But many don't know where to find help or who to trust.

SMSF trustees now have unprecedented and open access to the resources and expertise of global Investment Managers, so you can be confident your clients will be in safe hands.

OpenInvest is an independent online marketplace, offering direct consumer access to fully diversified, investment portfolios managed by world class Investment Managers.

All fees are clearly explained and transparent.

- ✓ Digital Managed Portfolio Solution
- ✓ No AFSL needed
- ✓ Your clients will be in safe hands
- ✓ An investing solution for grown-ups

Your clients choose their Investment Manager, and the style of portfolio that suits them.

You can make your clients aware of OpenInvest via Factual Information – which means it is not financial advice.

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ASSET MANAGEMENT

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Where to obtain a managed diversified portfolio

Advances in technology and product development mean Australian investors now have several ways they can directly access- without going through a financial adviser – a professionally managed diversified portfolio that suits their financial objectives, needs and circumstances.

Some of these solutions are described below:

Category	Provider(s)	Description	More Information
Diversified Index ETFs	Vanguard	Vanguard's Diversified Index Exchange Traded Funds (ETFs) give investors a multi-asset solution via a single ETF. Vanguard offers four such Diversified Index ETFs, from conservative to high growth. They may be accessed on the ASX via any online stockbroker.	vanguardinvestments.com.au/adviser/adv/v/diversified-ETFs.jsp
"Robo-advice" platforms	Six Park Stockspot	Online investment services such as Stockspot and Six Park allow investors including SMSFs to receive personalised investment advice based on technology and algorithms that match the right investment portfolio to their goals, timeframe, and risk capacity. These providers offer investment portfolios from conservative through to high growth, that leverage the low cost and diversification benefits of ETFs.	sixpark.com.au stockspot.com.au
Managed diversified ETF portfolios	BT InvestSMART	Westpac-owned BT and ASX-listed InvestSMART offer diversified portfolios that cover a range of risk profiles, from conservative through to high growth that leverage the low cost and diversification benefits of ETFs.	bt.com.au/personal/investments.html investsmart.com.au
Investment Manager marketplace	OpenInvest	OpenInvest's marketplace allows SMSF trustees to explore and engage with an open menu of high quality investment management companies. Trustees can view profiles of each available Investment Manager, and read and watch a range of Insight pieces offered by each manager in order to better understand their respective investment philosophies and approaches. Each Investment Manager offers four diversified portfolios that cover a range of risk profiles, and which may invest in ASX-listed shares, managed funds, and ETFs, according to each Investment Manager's strategy. Trustees choose their preferred manager and portfolio only when they feel ready to do so.	openinvest.com.au

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