SUPERANNUATION, INVESTMENTS AND RETIREMENT SOLUTIONS

A NEW WAY TO
EXPAND YOUR CLIENTS' POTENTIAL

For many years, Allan Gray's managed funds have been providing your clients with an exceptional way to diversify their investments to achieve their goals. We're now pleased to present you with another way to access our Funds and manage your clients portfolios for the long term, through the Allan Gray Superannuation, Investments and Retirement Solutions.

AN UNWAVERING COMMITMENT
TO YOU AND YOUR CLIENTS

Our Superannuation, Investments and Retirement Solutions deliver efficiencies, choice and control at a competitive price.

COMPETITIVE FEES WITH YOUR FUTURE IN MIND

We want you to access our extensive investment menu and have your clients simply pay for what they choose to invest in. Use our administration fee calculator to see how investment choices control administration fees.
Go to allangray.com.au/calculator to find out more.

NO FAVOURITES

We firmly believe that for the same investment amounts, everyone should be able to access the same competitive fee levels and determine their own administration fees. What's more, where technology has helped us reduce fees for certain investments, we pass those savings on to your clients.

SOLUTIONS FOCUSED ON THE LONG-TERM

Our solutions move with your clients' needs, from job to job and beyond. The same extensive investment menu is available through investments, superannuation and retirement which makes it easier when the need to move into retirement arises. We are focused on the long-term and want to ensure your clients are in charge of their financial future.

INDEPENDENT THINKING OUR INVESTORS TRUST

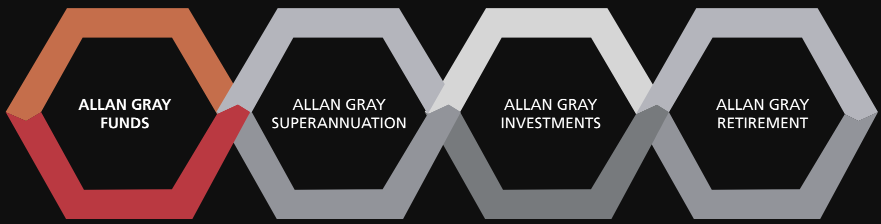
We succeed by not following the crowd. Our contrarian approach is evident in everything we do – from creating an intuitive solution designed for both you and your clients to giving you the ability to control your clients fees. Being privately owned keeps us sharply focussed on investors interests, without external shareholders influencing our commitment to our principles.

HIGH QUALITY SERVICE EVERY TIME

Our commitment to more personalised service includes having a dedicated Australian-based team to meet your needs at every step. We offer you a host of helpful resources and research, including tools to help you explain fees to your clients. Our Relationship Managers are also dedicated to assisting advisers and look forward to helping you.

ENHANCED POTENTIAL TO MEET EVERY NEED

ALLAN GRAY



FEATURES DESIGNED TO BROADEN YOUR OPPORTUNITIES

A FULL SUITE OF INVESTMENT PRODUCTS

- ASX Listed Securities
- An extensive selection of managed funds
- A range of exchange-traded funds (ETFs) and listed investment companies (LICs)
- Term deposits from a range of providers
- Choice of Managed Accounts.

INSURANCE OPTIONS TO MEET YOUR CLIENTS' NEEDS

- Simple default group insurance from MLC
- A choice of retail insurers including AIA and TAL

INTUITIVE ONLINE TRANSACTIONAL CAPABILITIES

- Our digital portal gives you full transactional capabilities which are easily controlled from the online order pad
- Your clients benefit from 'read-only' portal access so they can access information at any time.

A COMPETITIVE FEE STRUCTURE

- Every investor can access the same investment menu and simply pay for what they choose to invest in
- No preferential treatment means all investors benefit from the same competitive fees
- Handy tools, including a fee hub, helps you explain fees to your clients, for full transparency.

ACCESSIBLE MINIMUM INVESTMENT AMOUNTS

- Allan Gray Investments
  minimum investment: $2,500
- Allan Gray Superannuation
  minimum investment: $2,500
- Allan Gray Retirement
  minimum investment: $20,000.

SEAMLESS INTEGRATION WITH YOUR BUSINESS

- Our Solutions can integrate seamlessly with most financial planning software including XPLan, Coin, Midwinter and AdviserLogic, plus Accounting software including BGL SF, BGL360 and Class.

SMART FUNCTIONALITY AND REPORTING

Our Solutions are underpinned by leading-edge technology that lets you manage your clients' portfolios with ease. This includes:

- Online applications, withdrawals and transactions
- Portfolio summaries
- Reporting across client history, transactions, asset allocation and performance
- You can also access our reports directly for use in your statements and other advice records
- Corporate actions functionality
- Term deposit maturity portal.

CONNECT WITH US

To discover more about our distinctive investment solutions for your clients and learn more about our Superannuation, Investments and Retirement Solutions, email or call your local Relationship Manager. Find them in our adviser hub at allangray.com.au/adviser

CLIENT SERVICES

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