

# Discover a brighter future

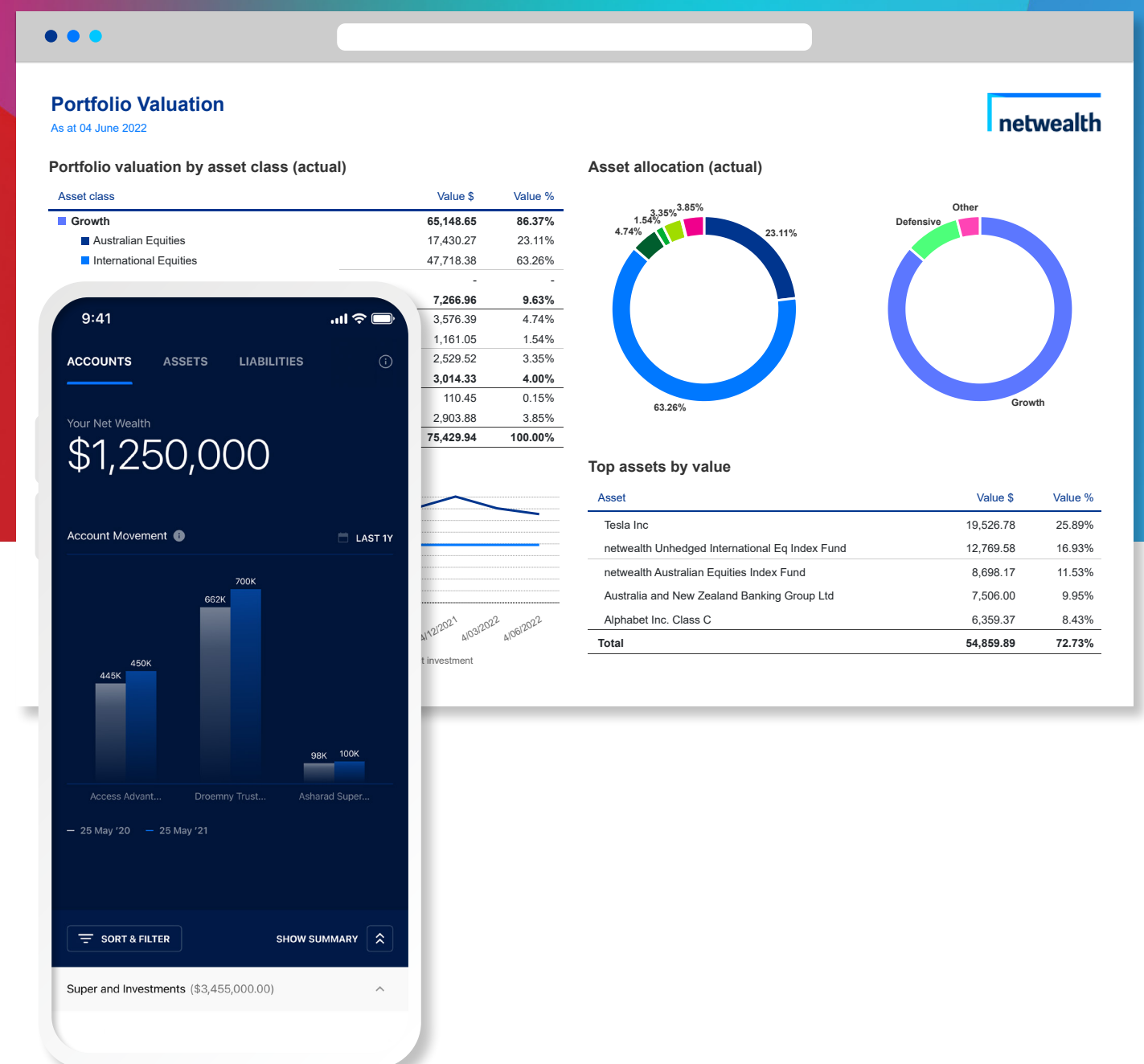
See your wealth differently with  
Netwealth, Australia's award-winning\*  
super and investments platform.

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# See wealth differently

Partnering with Australia's award-winning\* super and investment platform provides unparalleled choice in how super and investments are managed.

You'll discover the difference by having access to a wide range of investments, multiple account options to suit a variety of needs, and sophisticated online tools to give you greater control all in one place.





# Partner with us to see what's possible

Netwealth was created with an entrepreneurial spirit to challenge the conventions of Australia's financial services.

Founded in 1999 and listed on the ASX in 2017, Netwealth is one of the fastest growing wealth management businesses in Australia.

With us, you can see wealth differently, because we are different—in our approach, our attitude, our commitment and our spirit.

Partner with us to see what's possible and discover a brighter future.



**125,000+**  
Netwealth account holders



**3,500+ advisers**  
use our solutions to manage client wealth



**550+ Netwealth staff**  
and growing

## Helping your adviser help you.

With Netwealth, you and your adviser are using feature-rich technology recognised as being #1 and best in class for helping deliver better wealth outcomes for you\*.





# Helping all Australians see wealth differently



**We're delighted that our partnership with Banqer supports over 100,000 Australian children with access to a financial education every year.**



Banqer is a financial literacy program that teaches children how to earn, save, spend and invest their money in a safe and engaging way. The online education provides real-world money skills to help children be better prepared for their financial future. Some of the skills include earning a wage, taking out insurance, making mortgage repayments, superannuation and investing in property. If you know a primary school child in Australia that could benefit from this program, visit [banqer.com.au/netwealth](https://banqer.com.au/netwealth) to refer a school or teacher today.

# See your wealth managed your way

No two investors have the same wealth objectives and goals change over time. With Netwealth, we have both super and investment accounts designed to meet your current and future needs—all backed by award-winning\* technology.



## Super Accelerator

**A super account  
to suit any stage  
of life**

Super Accelerator accounts offer access to a wide range of investment options, whether you are just starting out or have more complex investment needs. Access a wide range of managed funds, managed account models, ASX and international securities, plus more. Take advantage of accumulation or pension accounts, plus insurance options that cover death, total and permanent disablement and income protection.



## Wealth Accelerator

**Investment accounts  
for SMSF and investors  
for a whole-of-wealth view**

Wealth Accelerator is a full-featured online investment account, perfect for an SMSF trustee, investor or family office looking to manage their investments in one place. Expand your range of investments with premium assets like domestic and international bonds, and multi-currency trading. Let Netwealth help streamline the administration and management of complex assets like private equity and debt.

Some investment options are only available via Plus accounts.

# Access a wide-range of investment options

With Super and Wealth Accelerator accounts, you’ll have access to investment choice and affordability options that suit your wealth goals.

Investment options in detail:

Income assets, including term deposits and term annuities

Choose term deposits and annuities of differing maturity lengths from a range of leading Australian banks and partners, with terms ranging from 3 months to 5 years.

Netwealth’s Global Specialist Series (GSS) funds and Managed Models^

Access professionally managed multi-sector/diversified and international investment managed account portfolios from quality managers.

Managed account models

Access professionally managed multi-sector/diversified and international investment managed account portfolios.

IM Funds^^

Invest in approved Information Memorandum products of differing class and allocations.

Australian and international-listed securities

Invest online in Australian listed securities including a large range of company shares, ETFs, AREITs, LICs, income securities, certain warrants and IPOs. Access international companies such as Nike, Nestle, Apple and many more. Choose from a range of securities listed on multiple international exchanges, including NYSE, NASDAQ and the LSE.

Domestic and international bonds^^^

Invest in a range of AUD denominated domestic and international bonds in parcels as low as \$50,000.

Non-custodial administration

The ability to simplify the management of assets held in your own name. An outsourced administration service that offers the benefits of reporting, tax statements and mail house support.



## Accelerator Core

Our cost-effective option with a range of index and active investment options.

Build diversified portfolios that are cost-effective using a diverse range of managed funds and managed account models, run by quality managers with strong track records.



45+ models



## Accelerator Plus

Rich investment choice from local, global and private market opportunities.

Build investment portfolios from a wide-range of assets, premium options plus administer complex assets all in one place.



100+ models



For a complete list of approved assets that can be invested in, refer to the Netwealth website. ^The GSS Managed Models are available in certain versions of the Netwealth Managed Account and may not be available to you. Refer to the PDS provided to you for the Netwealth Managed Account. ^^A range of investments offered under an Information Memorandum (IM) are available to clients who meet the definition of ‘Sophisticated Investor’ or ‘Wholesale Client’ as outlined in the Corporations Act. You can contact a business development manager from Netwealth to obtain a list of available investments if you meet this definition. ^^^Available for wholesale clients and only through a Netwealth Wealth Accelerator account.



# A suite of feature-rich online portfolio tools

Our focus is on providing you with the latest technology and wealth innovation. And, with access to your financial portfolio anywhere, you can manage all aspects of your super and investments on the go. Your adviser also has access to all our tools to manage your portfolio on your behalf.



**See your total wealth** by linking Netwealth super and investment accounts together, including family members, plus bank accounts, residential property, and personal investments.



**Gain new insights and opportunities** through our comprehensive reporting. Review portfolio performance and other elements of your portfolio, including income, capital movement, taxes and fees.



**Interact with your super and investments** anywhere through our mobile app.



**Buy, sell and track** your investments online



**Work with your adviser** and provide them with access to help you manage your account.



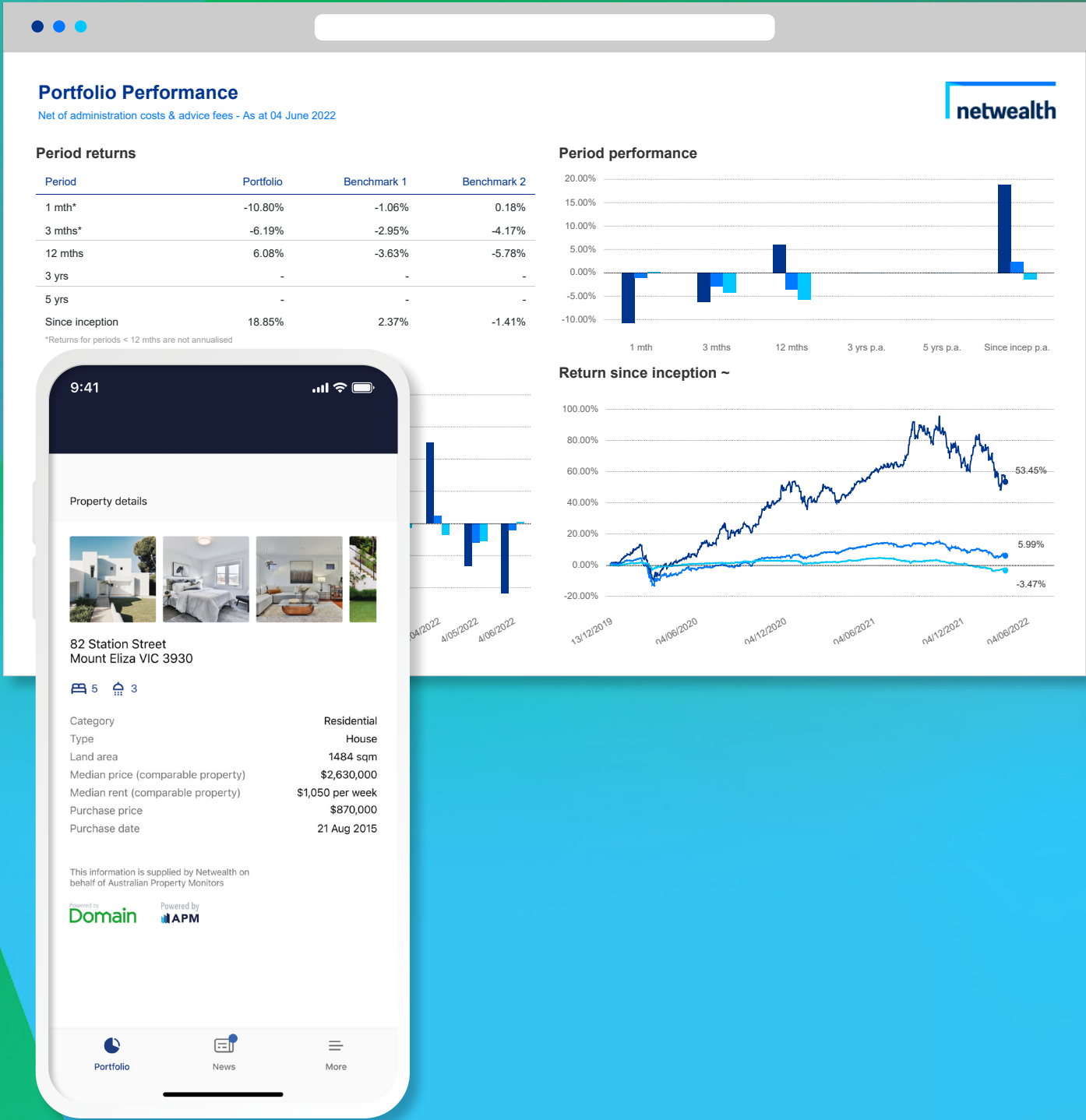
**Automate your investments**, with online tools like dollar cost averaging and reinvestment plans.



**Manage payments, savings, deposits,** super contributions, set up income and pension plans.



**Stay up to date with alerts** and receive task notifications for important account activities like expiring term deposits and corporate actions.



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**\*OUR AWARDS INCLUDE:** Rated by Investment Trends as number 1 in Overall Satisfaction by users for the ninth consecutive year (2014-2021) and rated number 1 by Investment Trends for Best Platform Overall in 2017-2019 and 2021. Rated by ChantWest as best Advised Product of the Year for four consecutive years (2018-2021). Award for 'Overall Satisfaction with Platform', Investment Trends 2020 Planner Technology Report; Winner award for best Reporting, Transaction Tools, Decision Support Tools and Product Offering Investment Trends 2020 Platform Benchmarking & Competitive Analysis Report; Winner award for 'Best Platform Overall', Investment Trends 2019 Platform Benchmarking & Competitive Analysis Report; SuperRatings 2019 gold rating for Super Accelerator Core and Plus and 2019 platinum rating for Netwealth Super Accelerator Core and Plus Standard Income Stream products (for details of SuperRatings' rating criteria visit <http://www.superratings.com.au>), winner in the Platform Provider category of SMSFAdviser magazine's 2019 SMSF Awards, Chant West Super Fund Award for Best Advised Product of the Year 2020, Financial Standard MAX Award for financial literacy campaign of the year 2018, 2018 Investment Platform Innovator of the Year category at the Fintech Business Awards 2018 and featured on the Australian Financial Review's most innovative companies list in 2018.

# Partner with us to see wealth differently

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