



PERSONALISED SERVICE CASE STUDY: Self-Directed Investor Service Model

SELF-DIRECTED INVESTOR SERVICE MODEL

CLIENT STORY

'I like doing my own research, making my own investment decisions but I want someone else to manage the administration of my portfolio'.

Bob is a business owner. Bob is an experienced investor and enjoys making his own stock selections but finds it too hard and stressful trying to keep a top of the paper work, and too time-consuming managing the trading and administrative part of his investment portfolio.



CLIENT'S GOALS & PREFERENCES

As a business owner, Bob is busy and time-poor. Bob likes to use his time on the things he enjoys. When it comes to Bob's investment portfolio, he seeks the following outcomes:

- Have more time to focus on investing & less time spent on managing the administration part of his portfolio
- Easy access to his portfolio's reports & statements 'whenever & wherever'
- A cost-effective portfolio administrative solution

"Bob wants to simplify his busy lifestyle, and spend his time on the things he enjoys. Bob wants a professional investment portfolio administrative service provider to help simplify things for him"

CLIENT SOLUTIONS

After a detailed discussion with his adviser, Bob was happy to select a **SELF-DIRECTED INVESTOR SERVICE*** model. ***DOWNLOAD FLYER**

CLIENT BENEFITS & OUTCOMES

Our 3 service options are tailored to incorporate both self-directed service alternatives & full advisory solutions to build an investment & service offering that fits your profile while still achieving your financial goals.

- Maintain control to make own investment decisions
- Outsource portfolio administrative management
- Access to technology that keeps Bob connected with all investment portfolio reports
- Connection to Bob's accountant for seamless reporting & compliance
- Highly cost-effective & personalised solution to suit Bob's needs and investment goals.

**Contact your accountant or financial adviser
to discuss your financial goals & needs:**

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