



PERSONALISED SERVICE CASE STUDY: Collaborative Investor Service Model

COLLABORATIVE INVESTOR SERVICE MODEL

'I want to be actively involved in the decision making when talking about my future but I'd like ongoing advice, engagement & an overall review of my progress against my plan from a professional.'

CLIENT STORY

Robyn is an Executive. Similar to other professionals, Robyn has a busy lifestyle but understands the importance of making plans now for future lifestyle goals. Robyn enjoys following the investment markets, has her own ideas but recognises the need for advice, and values the input of investment advisory professionals.



CLIENT'S GOALS & PREFERENCES

As a senior executive, Robyn is time-poor. Robyn prefers to put her investment ideas forward, and work with an adviser to reach investment decisions together. Robyn seeks the following goals:

- Use her time wisely to reach investment decisions in conjunction with advice.
- Seek ongoing review of her investment plans and progress check-ins.
- Professional advice on her existing portfolio to suit her investor profile and goals.

'Robyn enjoys the choice of approach to build her investments, and the access to other service offerings that fits her investor profile and her financial goals.'

CLIENT SOLUTIONS

After a detailed discussion with her adviser, Robyn selected the **COLLABORATIVE 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.

- Flexibility to self-manage and have access to active investment advice.
- Access to innovative and diversified investment solutions like SMAs
- Connection to Robyn's accountant for seamless reporting & compliance
- Choice to receive advice on a 'piece-by-piece' basis
- Personalised service & seamless client experience

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

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www.primelfinancial.com.au

