

PORTFOLIO REVIEW SERVICE



BELL POTTER ONLINE PORTFOLIO REVIEW SERVICE

Your clients look to you for expert advice in constructing and maintaining their investment portfolios. Now you can look to us to help you get it right, every time.

With Bell Potter Online's Portfolio Review Service you can be confident you're providing the best possible advice, with a second opinion from leading investment advisors. Think of us as a partner who is there to support you and your team, whenever you need an extra set of eyes.

Your partner in client support

The Bell Potter Online Portfolio Review Service helps you deliver the best advice to your valuable clients. It's designed to ensure you stay in control of your client relationships: we only deal with you, and not your clients. This prevents potential conflicts of interest and provides the security of knowing your client relationships are protected at all times.

The Portfolio Review Service is also completely confidential. It's up to you whether you disclose that you're using the service, depending on how you wish to position your services in the advice marketplace. For some, having an independent second opinion as part of the standard advice process can be a key selling point – providing additional confidence to clients and building trust in the advice they receive.

Others may prefer to use the Portfolio Review Service as an ad hoc check behind the scenes, for example, in particularly complex portfolios, when an additional expert viewpoint would be of value. No matter what you choose, the Portfolio Review Service will support you and your business to provide the best advice to your clients.

Seamless and convenient

A key benefit of the Bell Potter Online Portfolio Review Service is that it's a flexible and convenient resource that fits seamlessly with your existing process. There's no need to learn a new platform, change your execution method, or sign up to a new brokerage account or ongoing subscription.

It's also platform agnostic, so you don't have to trade with Bell Potter Online to take advantage of the service, or to implement any portfolio recommendations. The service is available to advisors and clients from anywhere, on any trading platform.

Best of all, with a flat cost for each report, you can pick and choose which portfolios to submit for review. So you decide when to use it, and when to go it alone, without paying for reviews you don't need.

"The Portfolio Review Service is a partnership between Bell Potter Online and your practice – providing a convenient and seamless second opinion while preserving the exclusivity of your client relationships."

Julie-Anne Burnicle
Senior Investment Advisor, Bell Potter Online

WHY USE THE PORTFOLIO REVIEW SERVICE?

With more than 20 years' experience in reviewing portfolios, the Bell Potter online team can provide you with specialised second opinion on your clients' portfolios.

The Bell Potter Online Portfolio Review Service can help advisors provide excellence in client advice, every time. It can assist advisors working on their own, or in a busy practice where it's difficult to find the time and resources for implementing formal portfolio reviews.

The Portfolio Review Service helps to fill this gap, with a cost-effective and fast second opinion from some of the industry's most seasoned investment advisors. Use it to enhance your client offering, provide advice across a wider range of investments – or simply to get an extra layer of certainty around the advice you provide.

1 >

The confidence of a second opinion

Enjoy the confidence that comes with knowing you're providing the right advice

2 >

Fast turn-around time

Receive your portfolio review report fast - usually within 48 hours

3 >

Access to industry experts

Benefit from advice by investment managers with decades of experience

4 >

Detailed reports

Benefit from a comprehensive analysis of each proposed security and recommendations to enhance relative portfolio performance.

5 >

A one-off, flat review fee

Pay one, flat fee for each review – with no ongoing or hidden costs

1 > **The confidence of a second opinion**

A second opinion never hurts, especially when it comes to financial advice. It can make the difference between advice that's good enough – and advice that can make a substantive difference to your client's wealth.

It can also give you increased certainty that you've covered all your bases: including investment factors, client needs, and compliance considerations. In the current environment, the Portfolio Review Service is a convenient way to protect your business and clients by putting an extra quality and compliance check in place.

Also, given the vast array of products and markets in the investment universe, it's understandable that sometimes you'll be asked to review portfolios that are outside your core expertise.

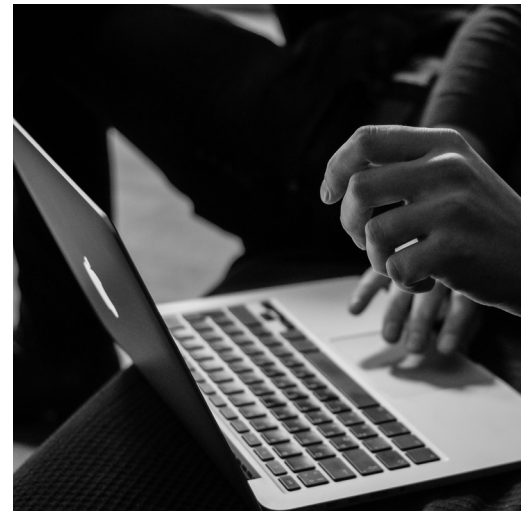
Rather than denying advice, the Portfolio Review Service enables you to offer reliable general advice in these areas – which in turn will allow you to broaden your client offering, and keep your clients in-house.

2 > **Fast turn-around time**

We understand the importance of getting back to your clients quickly, so they can act on your investment advice while it's current. The Bell Potter Online Portfolio Review Service offers a fast turnaround time, so it doesn't slow down your response to your clients.

Simply complete the Portfolio Review Service request form, and email it to us. Once we receive the flat, one-off payment, we'll start the review.

In most cases, you'll receive the portfolio report within 48 hours of submitting it for review.



3 >

Access to industry experts

The Bell Potter Online Portfolio Review Service is backed by the expertise of two of the industry's most experienced investment advisors.

Our advisors have spent their careers working with the intermediary segment, and understand the unique challenges facing financial advisors and dealer groups.

Each portfolio you send us is personally reviewed by these experts – not by junior advisors or

automated systems. And you'll deal with the same advisor every time, so you know exactly where the advice is coming from.

This approach ensures that there is a personal relationship behind each report, and that each recommendation you receive is relevant to the portfolio you submit – and based on years of hands-on investment practice and knowledge.



Geoff Beeston

Senior Investment Advisor,
Bell Potter Online.

Geoff has worked in the Financial Services sector for the past 20 years, specialising in providing advice to financial advisors and dealer groups. Geoff holds a postgraduate qualification of Masters of Applied Finance and a Bachelor's degree in Agricultural Economics.



Julie-Anne Burnicle

Senior Investment Advisor,
Bell Potter Online.

With over 20 years' experience, Julie-Anne is one of the best in the business, and has a deep understanding of the intermediary segment. She has a wealth of experience in both the commercial banking sector and share trading.



Paul Ashworth

Senior Investment Advisor,
Bell Potter Online.

Paul has worked closely with financial planners and intermediaries over the last 15 years to help design, monitor, and implement a range of direct investment strategies. Paul holds a Graduate Diploma of Applied Finance from Kaplan.

4 > Detailed reports

When you submit a portfolio review, our experts take a detailed look at the individual securities proposed for the portfolio. They take a particular focus on identifying undervalued or overvalued companies and portfolio construction risks (for example, GICS sector weightings).

They recommend adjustments to the portfolio, including suggested transactions where necessary, that could help achieve improved relative portfolio performance.

Then they report back to you in clear and detailed reports showing the changes and projected income across each calendar month, that you can reference and potentially share with your clients.

5 > A one-off, flat review fee

The Bell Potter Online Portfolio Review Service works on a one-off flat fee, charged for each portfolio you submit for review. There are no hidden costs or add-ons, registration or membership fees.

This makes it easy for you to factor in the cost of reviews in the charges you set for your clients. It also helps you to budget in advance for reviews on some, or all of your clients' portfolios.

"In today's advice environment, double-checking is a smart way to deliver on the best interests of your clients. And Portfolio Review Service is a fast and cost-effective way to get a second expert opinion on your clients' portfolios."

Geoff Beeston
Senior Investment Advisor, Bell Potter Online

For more information on costs, please contact us on 1800 330 088.

PROPOSED PORTFOLIO - GENERAL ADVICE.

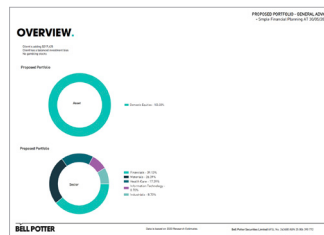
30 MAY 2019.

Prepared for:
Simple Financial Planning
Mr S Sample
Prepared by:
Julie-Anne Burnicle,

Toll Free: 1300 023 557
Level 29 101 Collins Street
Melbourne 3000

BELL POTTER

Bell Potter Securities Limited AFSL No. 243807 ABN 25 005 390 772



PROPOSED PORTFOLIO.

Equities

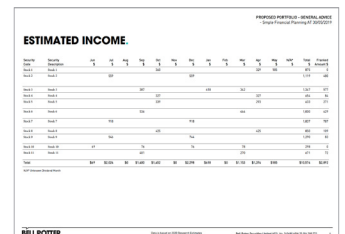
| Symbol | Company Name | Value | Percentage |
|---------|--------------|-------------|------------|
| ASX:XXX | Company A | \$1,000,000 | 10% |
| ASX:YYY | Company B | \$2,000,000 | 20% |
| ASX:ZZZ | Company C | \$3,000,000 | 30% |

BELL POTTER

RECOMMENDED TRANSACTIONS.

| Symbol | Company Name | Order Type | Quantity | Value |
|---------|--------------|------------|----------|----------|
| ASX:XXX | Company A | BUY | 100 | \$10,000 |
| ASX:YYY | Company B | SELL | 50 | \$5,000 |

BELL POTTER

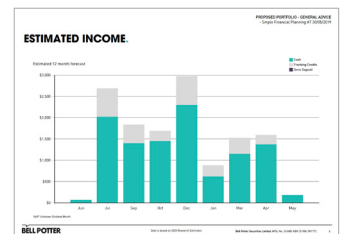


OVERVIEW.

Sector Summary

| Sector | Value | Percentage |
|------------|-------------|------------|
| Healthcare | \$1,000,000 | 10% |
| Technology | \$2,000,000 | 20% |
| Financials | \$3,000,000 | 30% |

BELL POTTER



YOUR QUESTIONS ANSWERED

Get in touch

Get in touch with our experienced team for general enquiries, pricing information, how to get started, open client accounts, place orders, and find trading ideas

Phone 1800 330 088

8am to 5.30pm Monday to Friday
(Eastern standard time)

Fax (03) 8663 2799

Email adviser@bellpotteronline.com.au

Postal address GPO Box 1630, Sydney NSW 2001

DETAILS OF THE ISSUER

Bell Potter Securities Limited
ABN 25 006 390 772 AFSL 243480

DISCLAIMER

Bell Potter Online is a service provided by Third Party Platform Pty Ltd ("TPP") ABN 74 121 227 905 AFSL 314341, at the request of Bell Potter Securities Limited ABN 25 006 390 772 AFSL 243480 ("BPS"). TPP is a Participant of the ASX Limited Group and a Trading Participant of Chi-X. TPP and BPS are subsidiaries of Bell Financial Group Limited ABN 59 083 194 763 ("BFG") but are separate legal entities. BFG and its subsidiaries do not guarantee, or have any liability to you in respect of, the obligations or performance of Bell Potter Online or any services or products offered by TPP. Some of the fees paid to TPP for the provision of its services will be remitted to BPS. TPP and BPS do not provide personal financial advice in relation to Bell Potter Online. You should consider your own financial situation, particular needs and investment objectives before acting on any of the information available on the Bell Potter Online website.