



As part of our Platinum service, we offer exclusive investment opportunities to select clients. This service is reserved for seasoned investors who have the expertise, desire and experience to engage in more sophisticated investments that are not available to the general public.

## The benefits

- ✓ The chance to grow your wealth further with exclusive access to high-return investment opportunities
- ✓ Superior portfolio outcomes
- ✓ Access to insights and research from our analysts
- ✓ Quarterly reviews/reporting, including tax summary statements
- ✓ Access to a leading wealth platform to view your portfolio and run reports
- ✓ The opportunity to diversify your portfolio

## Large range of products

- ✓ Private credit
- ✓ Private equity
- ✓ Growth alternatives
- ✓ International listed securities
- ✓ Australian listed securities
- ✓ Managed accounts

## Do you qualify?

Only investors who have demonstrated significant wealth and/or income, and are considered capable of managing their own financial interests, are eligible to invest.

You must be considered a wholesale investor with sufficient understanding of the merits, value and risk of investments. In broad terms and subject to our internal assessment, you must meet one of these criteria:

- You are investing at least \$500,000 in a financial product, or
- You have net assets of at least \$2.5 million (certified by a qualified accountant), or
- You have a gross annual income of at least \$250,000 for each of the last 2 financial years (certified by a qualified accountant)

**For Today, Tomorrow & Beyond.**

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