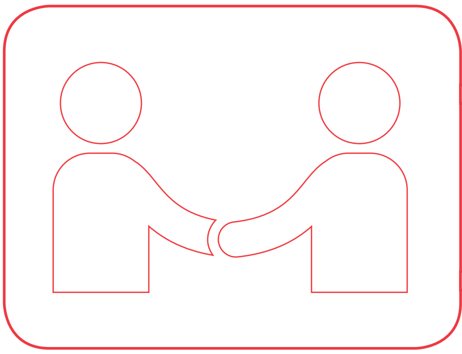
Expect More: Supporting Your Business

What can you expect from Morningstar Investment Management as your investment management partner?



Support for your business

- Scalable investment solutions
- Access to local resources
- Assistance with migrating existing client portfolios
- Marketing and client engagement tools and support

World class investment solutions for your clients

- Professionally managed investment solutions
- Client friendly market insights and portfolio updates

"We know that bringing investments to life and keeping your clients informed is a key aspect of your client relationships. That's why we're dedicated to providing you with the client friendly materials and support you need to help you manage client relationships as effectively and efficiently as possible."

Regan van Berlo, National Manager – Adviser Distribution
Morningstar Investment Management

How We Support Your Business

Our Adviser support tools are designed to help you in demonstrating the value you add to your clients. From practice management to regular investment insights, we have a range of value add tools you can use.

Adviser toolkit: An online resource with shareable and downloadable client materials, email templates, educational tools and investment updates to help you effectively and efficiently engage with your clients. In addition, you'll gain access to tools and resources such as suggested SoA and RoA wording as well as research packs to help you meet your compliance requirements. Go to http://www.morningstarinvestments.com.au/yourtoolkit for more information.

Morningstar managed portfolios: Providing your clients with actively managed portfolios whilst taking away the administrative burden and implementation challenges of investing on behalf of your clients.

Access to our people: We know you value access to the investment professionals that you've chosen to partner with. That's why we make sure you have access to a dedicated Relationship Manager and Portfolio Specialist to address any questions you or your client may have.

Leverage Morningstar's global resources: Morningstar's primary objective is to help investors. Unbiased and objective research is at the core of everything Morningstar does. Leverage this and more to inform, educate and demonstrate the value of your investment recommendations.

How We Support Your Business

Adviser business requirements	Morningstar capability	How we help
Researching investments		▸ Leverage one of the largest independent research teams in the world by accessing reports made available to you via the Adviser Toolkit as well as by your Relationship Manager ▸ Our team can share practical analysis compiled using Morningstar Direct™
Investing clients' money		▸ Choose the managed portfolios that best work for your business and your clients, without the need to issue an SoA/RoA for changes made within the portfolio.
Performance and compliance reporting		Keep yourself and your clients up-to-date with: ▸ Timely monthly and quarterly reports ▸ Asset Allocation Reports, Manager Allocation Reports and Trade Updates which contain the reasons behind each of our decisions so you're always informed and able to explain changes to your clients
Client engagement support		▸ Regular thought pieces, investment insights, adviser-to-client email templates, research and more all readily available in the Adviser Toolkit
Keeping up to date with your clients' investment portfolios		▸ Hear it first hand with our regular teleconferences and events
Attracting new clients		▸ Offer your clients actively managed multi asset managed portfolios, allowing you to free up time to concentrate on what you do best - providing strategic financial advice ▸ Our investments are complemented by a suite of communications and engagement tools accessed through the Adviser Toolkit.
Client financial education		No one knows your clients like you do, so if they need additional resources you can partner with us to share with your clients: ▸ Articles, videos and interviews ▸ Investment education tools and resources
Business and client administration		▸ Assistance with client transitions, onboarding and ongoing relationship management ▸ Support with investment compliance (e.g. suggested wording approved by your licensee for inclusion in your advice documents), reporting and more.

Working Together to Put Your Clients First

Working in collaboration with you, we provide a solution that taps into our combined strengths:

- You know your clients' goals and how to build plans to meet them.
- We combine our investment knowledge with portfolio management experience to provide investing solutions.

Bringing together two sets of experts, with one goal.

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Want to get in touch?
Let's work together to define your businesses investment needs.

Speak to your local Relationship Manager by calling us on (02) 9276 4550.