



# Your 'Individualised' Wealth Platform

**Acclaim Wealth** empowers individuals and advisers to manage their wealth, their way. We achieve this through innovative and flexible product design and by delivering unrivalled levels of service.

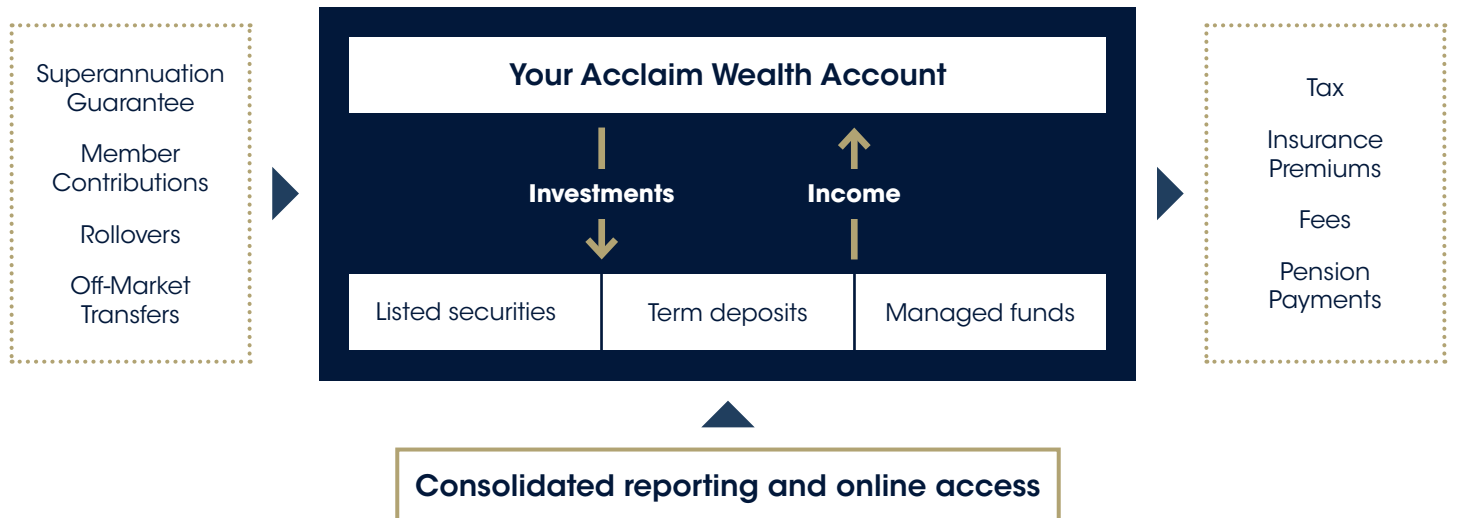
## About Acclaim Wealth

Acclaim Wealth has been part of the retail super platform space since 2000. Originally operating as AMG, Acclaim began as a joint initiative between DDH Graham Limited and Pension Investments Limited to bring to market a truly individualised and customisable retail superannuation platform. Acclaim Super and Acclaim Invest feature a unique product design allowing investors and advisers to choose the chess sponsor for their HIN, providing an unrivalled level of investment flexibility.

## About our Responsible Entities

Acclaim Wealth utilise Equity Trustees Superannuation Limited (EQT) as our corporate trustee and Equity Trustees Limited as custodian. Established in 1888, EQT is Australia's largest and oldest independent trustee, and is listed on the ASX.

## Your **Acclaim** wealth solution



## Independent Ratings

AAA rated by Rainmaker's Selecting Super. 5 Quality Stars rating by Heron Partnership.



# Take control with our complete wealth management platform solution

## Product Solutions

Award-winning products including:

- Personal super
- Pension accounts:
  - + account based pensions
  - + transition to retirement
  - + term allocated pension

Acclaim Invest account structures:

- Individual
- Joint accounts
- Partnerships
- Trusts
- SMSF
- Companies
- Associations

## Member Tools

- Comprehensive portfolio and tax reporting
- Device enabled 24/7 online account access
- Portfolio transparency
- Australian based dedicated client services
- Update your details online instantly

Product Solutions

Member Tools

Acclaim  
WEALTH

Insurance Solutions

Investment Flexibility

## Investment Flexibility

- Listed securities – all ASX listed securities
- Managed funds – 230+ options
- IPOs
- Term deposits – multiple providers

## Insurance Solutions

Providing choice of insurer is just as important as investment choice. Acclaim Super offers both group insurance and external platform insurance options.

## Investment flexibility is at the core of Acclaim's product design.

Investing in listed securities through Acclaim provides greater flexibility based on the following unique features:

- Invest in anything listed on the ASX including – ETFs, LICs, hybrids, alternatives and warrants
- Individual HIN for each account that is CHESS sponsored by your broker of choice
- Buy and sell shares same day
- Participate in corporate actions
- Participate in initial public offers
- Franking credits paid to your account when the dividend is paid (not available via Acclaim Invest)
- Off-market transfer (in specie) shares into and out of Acclaim Super, Acclaim Pension and Acclaim Invest

## Flexibility to choose the right insurance provider for your needs.

Acclaim Super provides the flexibility to fund your insurance needs through your Acclaim Super account, utilising Acclaim Wealth Insurance or external platform insurance.

### 1. Acclaim Wealth Insurance

- Group Life policy through AIA Australia Limited
- Competitive premiums
- Insurance transfer capability; matching existing group insurance levels of cover with group insurance upon full balance rollover

### 2. External Platform Insurance

- Ability to fund individual retail policies through client's Acclaim Super account
- Approved providers:
  - + AIA
  - + TAL
  - + Zurich
- Any insurer via rollover

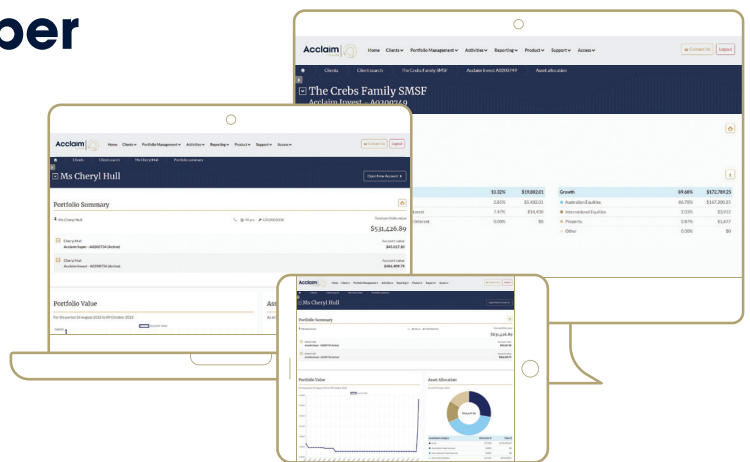


# Product summary and costs

Product	Acclaim Super and Pension	Acclaim Invest
<b>Investments</b>		
All ASX listed securities	Yes	Yes
Term deposits (multiple providers)	Yes	Yes
230+ managed funds	Yes	Yes
International direct shares	No	No
Individual HIN for each investor	Yes	Yes
Broker sponsored HIN	Yes	Yes
Assets held on broker's PID	Yes	Yes
Contra-trading	Yes	Yes
Participation in corporate actions	Yes, through broker	Yes, through broker
When are franking credits allocated	When dividend paid	N/A
Participation in IPOs	Yes	Yes
Dividend reinvestment plan	Available with individual approval	Available with individual approval
Off-market transfers	In & out	In & out
Automatic portfolio rebalancing	Yes	Yes
Mailing house service	Yes	Yes
Choice of broker	Yes	Yes
Margin lending	No	Yes
<b>Fees</b>		
Transaction cost	Nil	Nil
Family fee aggregation	Yes, available on up to 4 accounts	Yes, available on up to 4 accounts
Fail trade fee	Nil	Nil
Off-market transfer out	\$25 per holding	\$25 per holding
Term deposit fee	\$35	\$35
<b>Insurance</b>		
Insurance available (Super only)	Death, TPD, IP	N/A
Automatic transfer with rollover	Yes	N/A
Retail insurance options: AIA, TAL, Zurich	Yes	N/A
Binding, lapsing and non-lapsing beneficiary nominations	Yes	N/A
Reversionary pension	Pension Only	N/A
<b>Engagement &amp; Reporting</b>		
Market leading adviser portal with self service capability	Yes	Yes
Customisable portfolio reporting and benchmarking	Yes	Yes
Automatic report scheduling to clients	Yes	Yes
Service	Access to administrator not just call centre	Access to administrator not just call centre
Consolidated Tax Reporting	N/A	Yes

## Make the most of your super and investment portfolios

- Salary sacrifice to increase your account balance and reduce income tax
- Find lost super easily online
- Gain taxation deductions for contributions
- Easily consolidate all of your super funds
- View all your investments on one platform
- Benefit from fee discounts when multiple accounts are held through Acclaim products
- Allow your adviser to create a truly tailored investment solution to meet your goals



For further information, please contact your adviser directly or refer to the Product Disclosure Statement available on the Acclaim Wealth website at [www.acclaimwealth.com.au](http://www.acclaimwealth.com.au)

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