



# Your 'individualised' Wealth Platform

**Acclaim Wealth** allows 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. Empowering advisers to deliver tailored outcomes to clients.

## 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 for brokers and advisers. Acclaim's products feature 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.

## Our Values

At Acclaim, relationships are at the center of what we do. We think like our advisers and always do what we say. Our people take pride in the work we do and the service we provide.

## Where does **Acclaim** fit into your business?



# Take control with our complete wealth management platform solution

## Product Solutions

Award-winning products including:

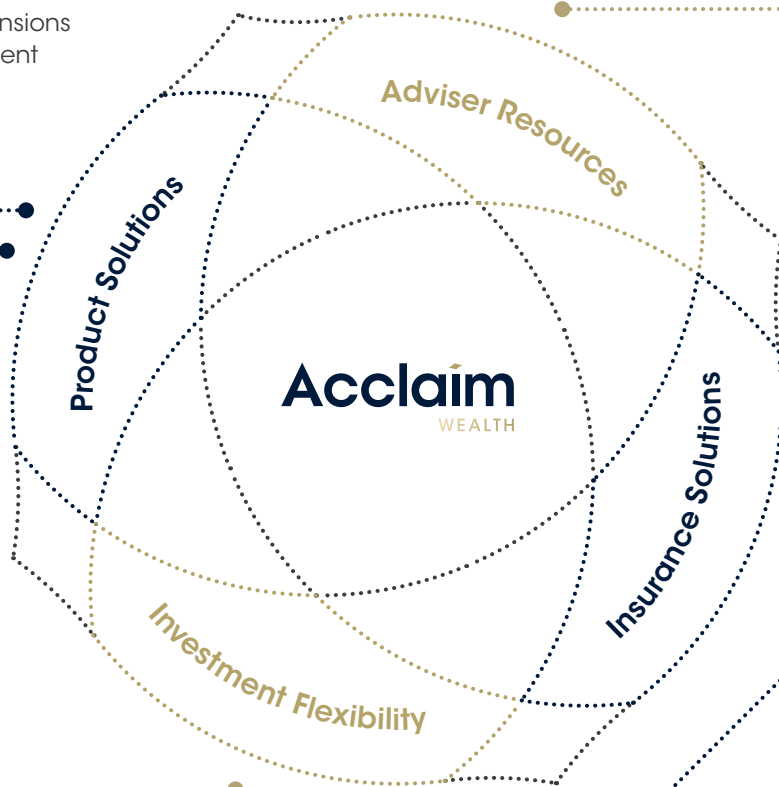
- Personal superannuation
- Pension accounts:
  - + Account-based pensions
  - + Transition to retirement
- Investment accounts

## Acclaim Invest account structures:

- Joint accounts or partnerships
- Trusts
- Individual
- SMSF
- Companies
- Associations

## Adviser Resources

- Comprehensive portfolio and tax reporting
- Device enabled 24/7 online account access
- Adviser marketing support
- Complete range of adviser tools and education
- Access to business development resources
- Australian-based adviser services team



## Investment Flexibility

- Listed securities – all ASX listed securities
- Managed funds – 250+ 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 client that is CHESS sponsored by broker of choice
- Ability to contra-trade
- Participate in corporate actions
- Participate in IPOs
- Franking credits allocated to clients when the dividend is paid
- 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 clients.

Acclaim Wealth provides advisers with the flexibility to fund their clients' insurance needs through their Acclaim Super account, utilising group insurance or external platform insurance.

### 1. Group Insurance

- Group Life policy through AIA Australia Limited
- Competitive premiums
- Insurance transfer capability; matching existing group insurance levels of cover 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
250+ 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
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
<b>Fees</b>		
Transaction cost	Nil	Nil
Individual and family fee aggregation discount	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 platform insurance options: AIA, TAL, Zurich	Yes	N/A
Group insurance cover: AIA (super only)	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 members	Yes	Yes
Service	Dedicated adviser services team	Dedicated adviser services team
Consolidated tax reporting	N/A	Yes

## Why choose our powerful platform?

Our platform provides a modern and intuitive interface, with a high degree of self-service capability. Features include:

- Streamlined account opening
- Comprehensive reporting and benchmarking
- Auto-schedule reports to clients
- Individual and family fee aggregation discount
- Delegate access for support staff (read and transact)
- Consolidated view of super and non-super portfolios
- Group Acclaim Super and Acclaim Invest accounts for fee aggregation

And much more



For general adviser enquiries please contact [adviserservices@acclaimwealth.com.au](mailto:adviserservices@acclaimwealth.com.au) or **1300 629 787**.

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