

HUB²⁴



ONE PLACE FOR ALL OF YOUR INVESTMENTS

One place for your investments



Welcome



1. Who is HUB24?



What does a platform do?



Stay connected with
InvestorHUB



2. A broad investment menu



3. What is a managed portfolio?



What are the benefits?



4. Tax optimisation tools



5. Want to know more?



WELCOME

1.

Who are we?

- Get to know us
- What does a platform do?
- Stay connected with InvestorHUB

2.

A broad investment menu

- What investments are available on HUB24?

3.

What is a managed portfolio?

- What are the benefits?

4.

Tax optimisation tools

- Helping you and your adviser manage your tax outcomes

5.

Want to know more?

- Where can you find out more about HUB24?

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ABOUT HUB24

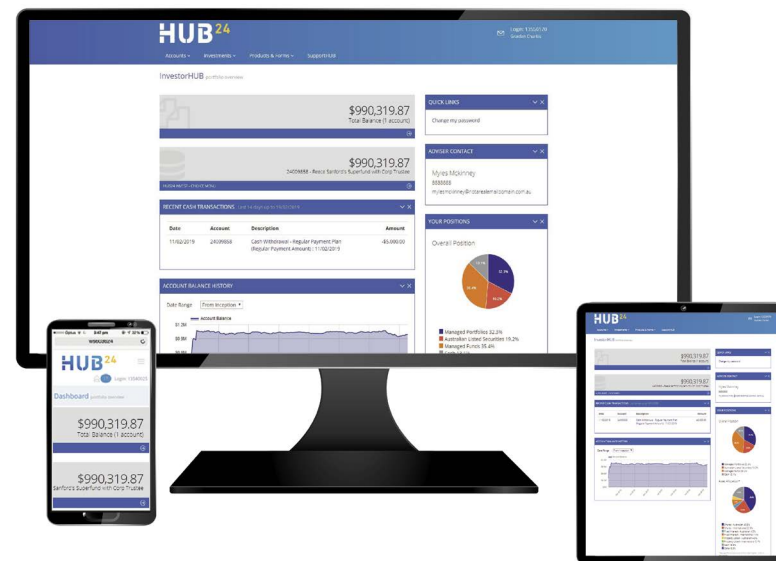
HUB24 Limited is a company listed on the Australian Securities Exchange, established in 2007 by a team with a very strong track record of delivering market-leading solutions in the financial services industry.

HUB24 is a fully integrated platform solution for super, pension, investments and insurance.

We offer comprehensive range of investment options, with enhanced transaction and reporting solutions, for all types of investors – individuals, companies, trusts, associations or self-managed super funds.



Watch the video



Our market-leading platform continues to be recognised by the industry for adviser satisfaction, functionality and user experience, including a four apple rating for our HUB24 Super and HUB24 Pension products from Chant West.

The rating is issued by SuperRatings Pty Ltd ABN 95 100 192 283 AFSL 311880 (SuperRatings). Ratings are general advice only and have been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. The rating is not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings are subject to change without notice and SuperRatings assumes no obligation to update. SuperRatings uses objective criteria and receives a fee for publishing awards. Visit superratings.com.au for ratings information and to access the full report. © 2020 SuperRatings. All rights reserved.

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WHAT DOES A PLATFORM DO?

Platform technology allows you to combine your investments in one place, within one account. This includes managed funds, international and Australian listed securities, insurance, managed portfolios and term deposits.

This means you get a clear overview of your portfolio, making your investments, and their performance, more transparent.



STAY CONNECTED TO YOUR INVESTMENTS

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With HUB24, you can stay connected to your investments. Our award-winning InvestorHUB is a dedicated online portal that empowers you to take better control of your finances, making wealth creation a more dynamic and accessible experience.

Key benefits include:

- ✓ Access to InvestorHUB via your desktop or mobile
- ✓ Simple to navigate
- ✓ Consolidated view on all assets held through HUB24
- ✓ Easy to access to a wide variety of reports



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A BROAD INVESTMENT MENU

You and your adviser can select the investment options you need from a broad investment menu that includes managed funds, ETFs, LICs, listed equities (Australian and international), term deposits and professionally managed portfolios.

You're also able to access a range of retail life and TPD insurance products from a selection of providers.

	IDPS (CHOICE)	IDPS (CORE)	SUPER (CHOICE)*	SUPER (CORE)*
Managed Portfolios (Domestic & Global)	150+	100+	150+	100+
Managed Funds	1000+	-	800+	-
ASX listed securities**	All ASX-listed securities	-	Generally all ASX listed securities	-
Exchange Traded Products (including ETFs, ETPs, ETMFs)**	All ASX listed ETPs	-	Majority of ASX listed LICs	-
Listed Investment Companies/Trusts**	All ASX listed LICs/LITs	-	Majority of ASX listed LICs/LITs	-
International listed securities	All ASX listed securities	-	All ASX listed securities (limits apply)	-
Term deposits	6 providers/ 3 different terms	6 providers/ 3 different terms	6 providers/ 3 different terms	6 providers/ 3 different terms
Foreign currency	10 foreign currencies	-	10 foreign currencies	-

*Limits apply

**Updated regularly – refer to applicable investment menu for current securities. Include Hybrids, Stapled Securities, FRNs and Convertibles.

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WHAT IS A MANAGED PORTFOLIO?

Managed portfolios are a flexible and efficient way to have your investment strategy managed professionally, because the underlying investments are held in your account.

They provide access to professional portfolio construction across a variety of asset classes and investment strategies, while combining some of the benefits of traditional managed funds and holding investments directly, by:

- ✓ Providing full transparency and portability of assets, as underlying investments are held in your account
- ✓ Allowing you to change portfolios with minimal cost and effort, or take back control of assets at any time
- ✓ Giving you the benefit of a professional manager who advises on the asset selection and ongoing management of the portfolio



SMAs



MANAGED
FUNDS



LICs
EFTs



AUSTRALIAN
SHARES



CASH



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WHAT ARE THE BENEFITS?

Managed portfolios offer a combination of the benefits of investing directly and professional management, within a structure that may be more cost effective and efficient than investing in direct shares of a managed fund. Benefits include:

Transparency

You know what you're investing in

Cost savings

Netting of trades within your account may reduce transaction fees

Diversification

Access the expertise of professional managers to construct your portfolio

HUB24 offers a range of managed portfolios that cover a variety of asset classes and investment strategies. These include single sector, multi-sector, and Australian and international listed portfolios.

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TAX OPTIMISATION TOOLS

At HUB24 we understand that optimising your tax outcome is important, so we have created tools that your adviser can use to provide transparency around your tax outcomes and the information required to help your adviser make decisions.

This includes:

- ✓ Ability to estimate and model tax outcomes and CGT impacts before a trade is placed
- ✓ A choice of tax management approaches including minimum gain, maximum gain, or first in first out
- ✓ Optimise tax outcomes through sale of specific assets
- ✓ Consolidated tax reporting makes it easier for you, your adviser and your accountant at tax time

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WANT TO KNOW MORE?

Speak with your adviser or call our team on 1300 854 994.



Phone
1300 854 994



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HUB24.com.au



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Target market determination: A target market determination (TMD) has been prepared which considers the design of this product, including its key attributes, and describes the class of consumer for whom this product is likely to be consistent with based on their likely objectives, financial situations and needs. A copy of the TMD for this product can be obtained from your financial adviser or is available on our website at www.hub24.com.au.

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