

ONE PLACE FOR ALL OF YOUR INVESTMENTS

WELCOME

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?



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?



ABOUT HUB24

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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.

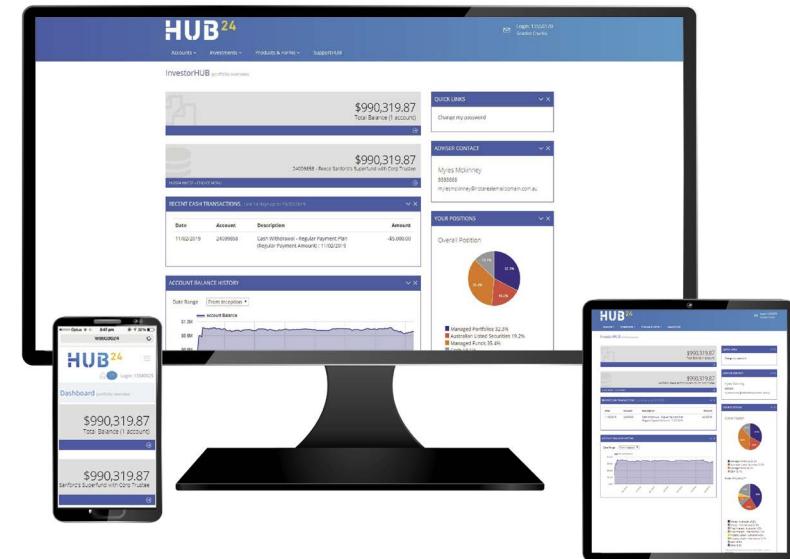
We offer comprehensive range of investment options, with enhanced transaction and reporting solutions, for all types of investors – individuals, companies, trusts, associations or self-managed super funds.



Watch the video



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.



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.

WHAT DOES A PLATFORM DO?

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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

The screenshot displays the HUB24 InvestorHUB interface on a tablet. The top navigation bar includes 'Accounts', 'Investments', 'Products & Forms', and 'SupportHUB'. The top right corner shows a login message: 'Login: 13550170 Graiden Charles'. The main content area is titled 'InvestorHUB portfolio overview'. It features a large 'Total Balance' of \$990,319.87 across 1 account. Below this are sections for 'RECENT CASH TRANSACTIONS' (showing a withdrawal on 11/02/2019) and 'ACCOUNT BALANCE HISTORY' (a line graph from inception to June 2019). To the right, there are three main panels: 'QUICK LINKS' (Change my password), 'ADVISER CONTACT' (Myles McKinney, 888888, myles.mckinney@notarealemaildomain.com.au), and 'YOUR POSITIONS'. The 'YOUR POSITIONS' panel includes a pie chart of the overall position and a detailed asset allocation chart at the bottom. The bottom of the page includes a note: '* Managed funds data sourced from Morningstar - refer to prospectus for details'.

A BROAD INVESTMENT MENU

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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.

WHAT IS A MANAGED PORTFOLIO?

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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



PROFESSIONAL
MANAGERS



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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.

TAX OPTIMISATION TOOLS

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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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Phone
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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.

Disclaimer: This document is provided by HUB24 Custodial Services Ltd ABN 94 073 633 664, AFSL 239 122 (HUB24) and is current as at 1 May 2022. HUB24 is the operator of HUB24 Invest (an investor directed portfolio service) and a promoter and service provider of HUB24 Super which is a regulated superannuation fund. The trustee of and issuer of interests in HUB24 Super is HTFS Nominees Pty Limited, ABN 78 000 880 553, AFSL 232500, RSE. L0003216. Any advice or information in this brochure is general in nature only. It has been prepared without taking into account your particular objectives, financial situation or needs. Before acting on any advice in this brochure you should assess or seek advice on whether it is appropriate for your needs, financial situation and investment objectives. There are risks as well as benefits associated with all investments, including IDPS, superannuation, and managed portfolios. Disclosure documents (including the IDPS Guide and Product Disclosure Statement, as applicable, and managed portfolio disclosure documents) for HUB24 Invest and HUB24 Super can be obtained at: www.hub24.com.au, or by calling 1300 854 994. It is important to consider these documents, including the information about risks, before investing in HUB24 Invest, HUB24 Super (collectively referred to as the Products) and any managed portfolio or other investment available through either of the Products, or deciding to acquire or continue holding such products. The information given in this document is in summary form and does not purport to be complete. Due care has been taken to ensure that the information in this document is up to date and accurate. Nevertheless, no representation or warranty is made by HUB24 or any of its related bodies corporate as to the completeness or accuracy of the information in this document. Past performance is not indicative of future performance. Forecasts and hypothetical examples are subject to uncertainty and contingencies outside HUB24's control.