

Keep track of your investments in one place with HUB²⁴

Meeting your investment objectives requires investment choice and flexibility. You and your adviser can choose from a broad range of investment options available via HUB24 Invest and the HUB24 Non-Custodial Service.



Access a wide range of investment and insurance options to meet your objectives.



Conveniently access your account information online via InvestorHUB.



Keep your investment information secure online.



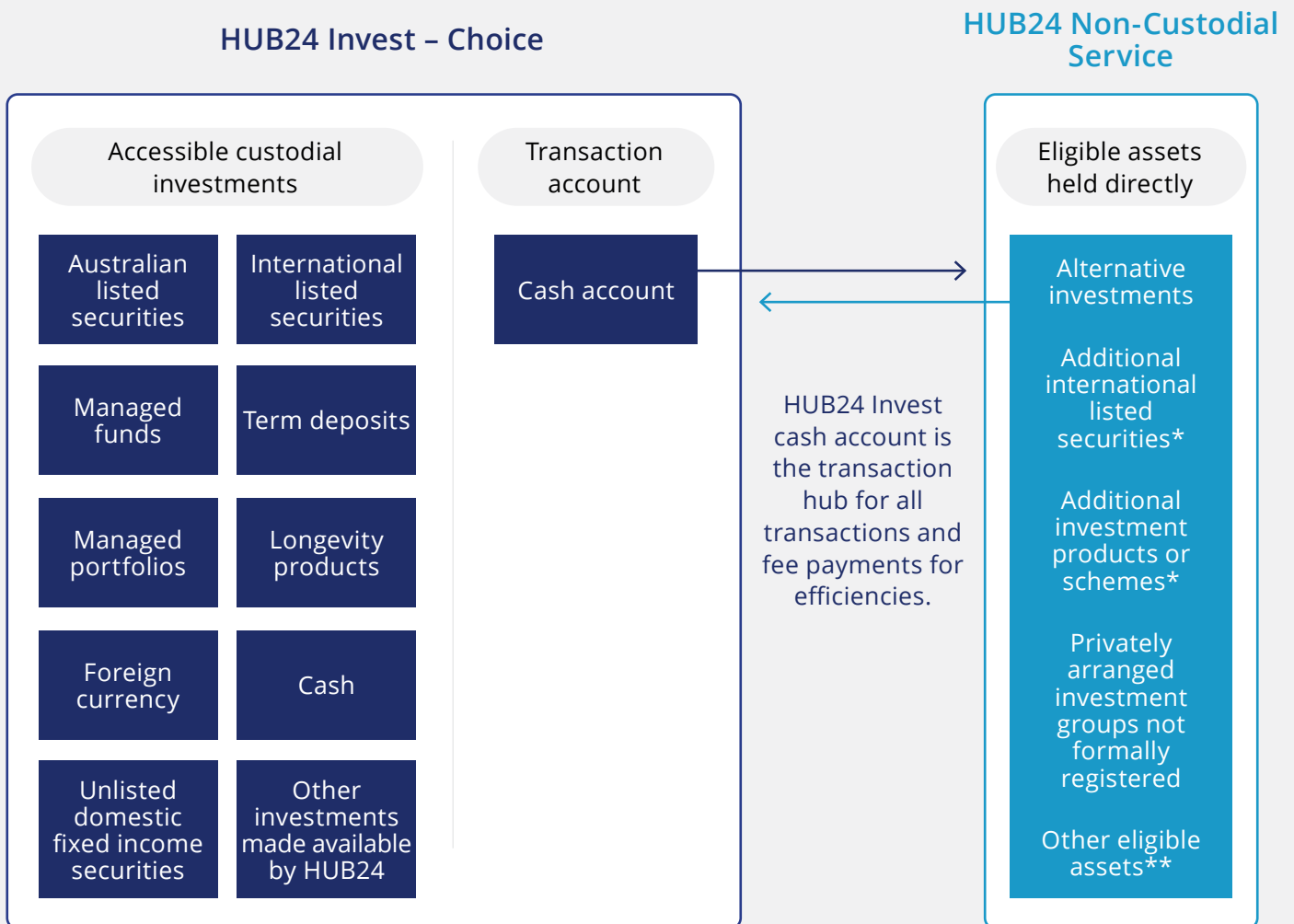
View a complete picture of your wealth in a single place.

How it works

To get started, your adviser will help you open a HUB24 Invest - Choice account and select from the investments available on the HUB24 platform. Next, your adviser will help you open your HUB24 Non-Custodial Service account to access administration and reporting for the assets you hold directly.

1. Your HUB24 Invest - Choice account and its investments are held on your behalf by HUB24, as the issuer and custodian. You retain beneficial ownership of these investments.

2. Your HUB24 Non-Custodial Service account includes the investments held directly in your name or by an external custodian, while the HUB24 Non-Custodial Service provides administration and reporting.



*Not currently available through HUB24 Invest - Choice

** Subject to HUB24 approval

The value to you



Viewing your investments in one place means that you can have:

- ✓ A clearer view of your overall financial picture.
- ✓ More meaningful, strategic conversations with your adviser about your wealth.
- ✓ Simpler day-to-day management because you can manage all of your assets online, reducing complexity and making it easier to stay on top of your investments.
- ✓ Greater clarity on how your investments can help support your goals.
- ✓ A transparent view of your portfolio that helps you stay more informed.

Important things to keep in mind

Statements and reporting available on InvestorHUB

All account information and statements will be available in your secure online portal, InvestorHUB.

Your financial adviser's role

Your financial adviser remains your main point of contact for discussions about your investment strategy and financial goals and will have access to information about your HUB24 Invest and HUB24 Non-Custodial Service accounts. They'll also be able to provide you with a comprehensive reporting for more in-depth discussions.

HUB24 becomes the registered address to receive information about investments held in your HUB24 Non-Custodial Service account – which removes the administrative burden

To provide administrative and reporting services for the assets you hold directly, HUB24 will receive mail and communications from the investment managers and external custodians who oversee your investments in the HUB24 Non-Custodial Service – saving you from time and paperwork.

Important things to keep in mind (cont.)

Choose from a broad investment range – we'll help you manage the admin work

Select from a wide range of retail or wholesale investment products, when appropriate. If product providers require specific documentation (such as wholesale certification), we'll help you manage it along the way.

Easy to move your investments to your HUB24 Invest – Choice account

If it's determined that an investment in your HUB24 Non-Custodial Service account can be held on the HUB24 platform, we'll move it to your HUB24 Invest account for greater administrative efficiencies. We'll notify you in advance before transitioning any of your investments from the HUB24 Non-Custodial Service to HUB24 Invest.

Speak with your financial adviser

If you're looking for more investment choice, greater visibility and a streamlined way to manage your wealth, HUB24 Invest together with the HUB24 Non Custodial Service may be right for you.

Speak with your financial adviser to learn how these solutions can support your goals and overall investment strategy.



HUB²⁴

General Advice Warning

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