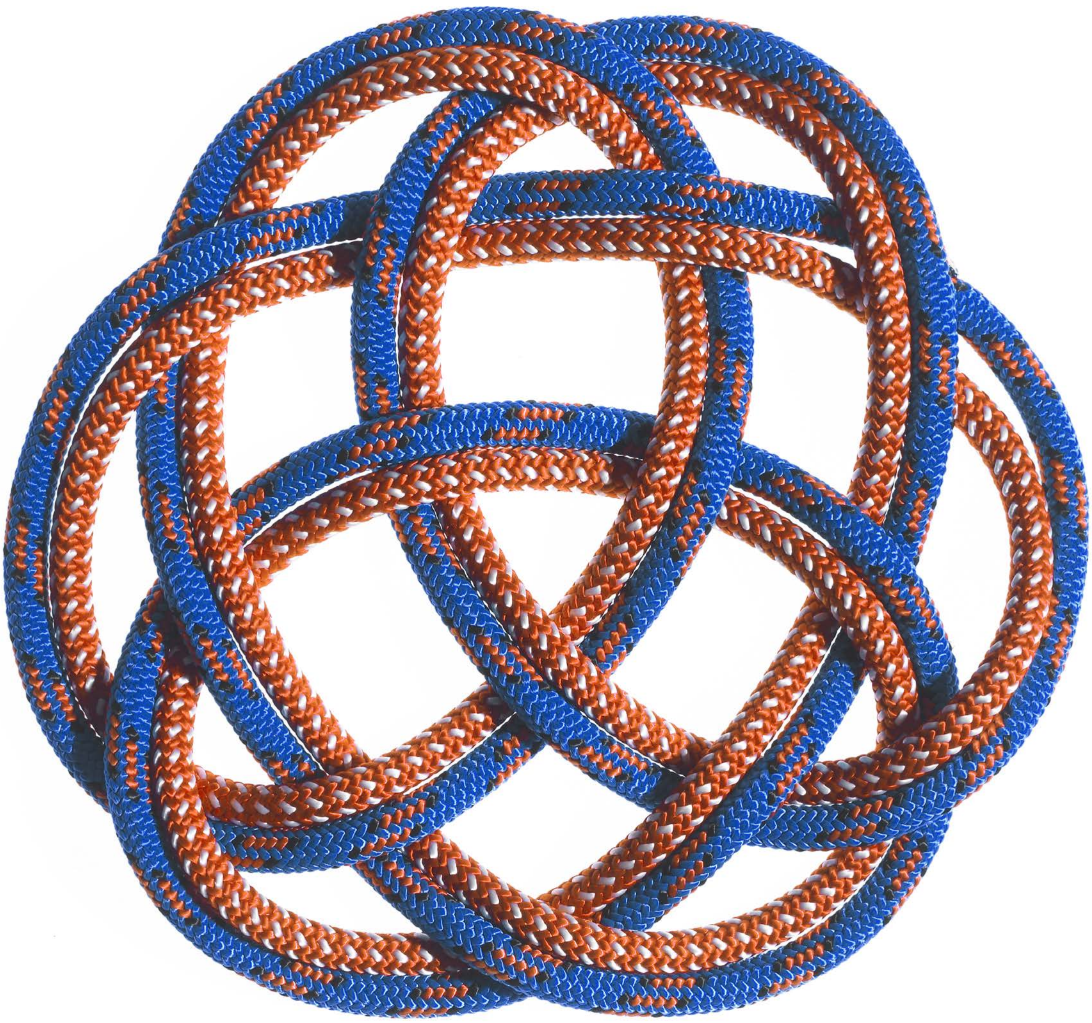
EMBRACE
PARTNERSHIP

Russell Investments

Supporting advisers to elevate their client experience while efficiently growing their business.



Partner with Russell Investments to elevate your business

Clients may sometimes struggle to remember the value that you provide as their adviser. It's important to deliver effective and memorable services that exceed your clients' expectations and increase loyalty. At the same time, of course, time is your most valuable resource. A dilemma many advisers face.

Russell Investments offers a variety of client servicing tools and resources to help you efficiently create and maintain a winning client experience.

Explore our tools and resources that may complement your client conversations.

You may want to **register for our secure website** to find materials and other helpful resources that are only made available to advisers.

Investment solutions

Globally, we work to source the best investment ideas to help deliver real value, manage risk and gain new sources of return.

Business solutions

We can help you transform and grow your business by focusing on what truly matters to your clients.

Investment Solutions

Delivering real value, managing risk and gaining new sources of return—the best ideas from around the globe.

MULTI-ASSET FUNDS

Multi-Asset funds

Our award winning, actively managed, multi-asset funds provide you with a diversified portfolio that delivers to the outcome you are seeking.

Our funds deliver real value using:

Real diversification. We design a blueprint for our funds drawing on truly diverse sources of return, to help the portfolio weather different market conditions and economic scenarios.

Best of breed components. Devoting significant resources, time and expertise to identifying the most effective strategies, the right funds, the best investments and the most efficient modes of implementation.

Active management to adapt to changing conditions. Our portfolio management team continuously assesses portfolio risk and adapts the assets, strategies and managers when necessary, to minimise risks and take advantage of the market opportunities.

MANAGED ACCOUNTS

Managed portfolios

Blending leading managers and strategies in a diversified, adaptive and efficient portfolio.

- We provide Institutional grade asset allocation expertise
- Access to the world's leading managers and strategies
- Robust processes to adapt responsibly to changing markets

EXPLORE OUR MANAGED ACCOUNTS

EXCHANGE TRADED FUNDS

Exchange traded funds

Innovative and diverse options for your portfolio. We offer a range of ETFs that can give you targeted exposure to global financial markets. Our ETF range provide solutions in

- Equity
- Bonds
- Responsible Investing

Real return funds

REAL RETURN FUNDS

Targeting an inflation plus return with reduced downside risk. Our Real Return series allows you to maintain your investment goals with substantially less volatility.

- Increase growth potential without increasing volatility
- Reduce draw-down risk in volatile markets
- Greater alignment of client expectations with fund objectives

Wealth and super series

WEALTH & SUPER SERIES

A best of breed investment and platform solution for you and your clients. Our Wealth and Super Series is a cost-effective way of accessing, both the Russell Investments suite of award-winning Multi-asset funds and the industry-leading technological capabilities of platform provider Netwealth.

EXPLORE OUR WEALTH AND SUPER SERIES

Sector funds

SECTOR FUNDS

Providing clients with select exposures to single sector strategies across an extensive range of traditional, alternative and opportunistic strategies. Increase growth potential without increasing volatility.

Our funds capture the best ideas quickly, efficiently and cost effectively by leveraging from our extensive manager research; our proprietary investment systems; and our 24hr in-house trading capabilities.

Winner of *Money* magazine's 2019 Best Fund Manager

For the sixth year in a row Russell Investments was chosen as *Money* magazine's 2019 Best of the Best Gold winner in the Multi-Sector Fund category

Business Solutions

By focussing on what truly matters to your clients, we can help you transform and grow your business.

Quarterly resources

Access quarterly insights and resources to help you navigate investment decisions and help improve client outcomes.

Multi-asset Q&A

Our multi-asset review discusses Russell Investments' performance in the past quarter and the outlook for year ahead.

Multi-Asset Quarterly Fund Overview

Our quarterly multi-asset fund review provides detailed information on market themes and our multi-asset funds for the previous quarter to discuss with your clients.

Managed Portfolios Quarterly Overview

Our overview provides detailed information on market themes and our Managed Portfolios for the previous quarter to discuss with your clients.

Managed Portfolio Investor updates

Each quarter we provide an update on the portfolios and trade movements that have taken place within the quarter for you to use with your clients.

If there is a significant change within the portfolio, we will provide an immediate **"rapid response"** communication for you to inform your clients.

Investor resources

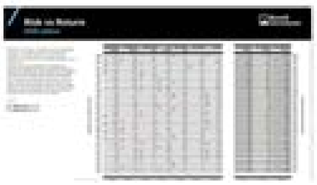
Engage your clients with educational tools, insights and materials that help explain investment concepts and support your client conversations.

Cycle of market emotions

Emotions can be such a threat to an investor's financial health, so it's important to be aware of them. This chart helps investors understand and be aware of the negative consequences of impulsive and irrational reactions to emotions.

Value of diversification

The temptation to chase short term returns can be hard to resist. This chart illustrates how different asset classes have performed relative to a multi-asset portfolio diversified across multiple assets, strategies & managers.



Risk vs Return

Investing in a single asset class is risky when you consider no one asset class consistently outperforms on a regular basis. This chart shows that no one asset class consistently outperforms on a regular basis.

Interactive tools

Take your client conversations to the next level with our interactive tools. Bring your client meetings to life, support your conversations and reinforce key insights into investing wisely.

Manager allocator

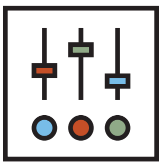
Use this tool to easily produce a report that shows the asset, fund and manager allocation of your client's portfolio.

Investor style quiz

A simple tool to help you to get an understanding of your client's risk profile and help you select an appropriate portfolio.

Retirement lifestyle selector

Move your client conversation away from account balance and towards ongoing retirement adequacy. This useful interactive tool may help your clients visualise what their life could look like when they retire.



Economic Dashboard

A visual tool to help you talk to your clients, this dashboard identifies a few economic and market indicators to help the identify current economic health and general market trends.

Value of staying invested

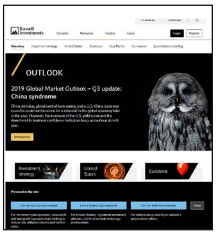
Although the markets might return a loss in difficult yeas, this tool shows the returns a client could have experienced had they stayed invested. Using weighted averages, it also demonstrates the difference in volatility and returns between lower risk and higher risk strategies.

Cycle of market emotions

When things are great, we feel that nothing can stop us. And when things go bad, we look to take drastic action. Because emotions can be such a threat to an investor's financial health, it is important to know how to keep your head above water in the cycle of investor emotions.

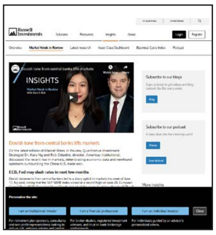
Insights

Access our best thinking on the issues our clients care about the most. Our podcasts, videos and articles are designed to provide insights on the hardest challenges investors face.



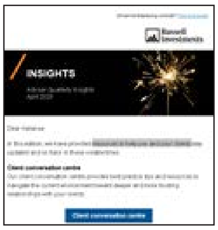
Global Market Outlook

Each quarter our investment teams summarise their economic outlook for you to read and share.



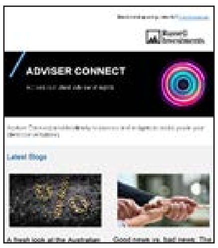
Market Week in Review

Each Friday our investment professionals produce a concise look back at important market drivers and events of the past week.



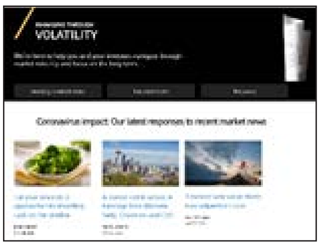
Quarterly Insights

Each quarter we provide investment and business solution resources and tools to help you in your client conversations.



Adviser Connect

Each fortnight we bring to you the latest blogs from our investment and business experts to help you in your business and keep updated with market movements.



Volatility toolkit

A toolkit of resources to help you and your investors navigate through market volatility and focus on the long term.

Practice management

Elevate your practice now and for the future.

For over 20 years, we have partnered with thousands of advisers across the globe to help them transform their business and deliver better client outcomes. Running a business can be tough, with less time to focus on what matters. We can help.

Explore our programs, resources and tools, designed to address advisers' needs and opportunities as they maximise their potential, evolve their practice and revolutionise their business throughout their lifecycle. Discover how we can help you today.

Maximise your potential

You want to help clients reach their desired outcomes while also continuing to grow your business. Discover tools and insights to help you maximise the potential of your business and your client outcomes.

Our programs include:

- The Discovery Process
- Optimise your experience
- Optimise your service model

Evolve your practice

You have a robust service model and built the foundations of your practice. Now you want to make your practice stand out, enhance client relationships and extend your business opportunities.

Our programs include:

- Behavioural Investing
- Demographics- Finding your ideal client
- Designing a modern referral strategy

Revolutionise your practice

Your practice humming along nicely and clients are delighted. But your mind keeps going to what might be the next possibilities. Our tools and insights can help you think about your business like a CEO.

Our program:

- Building a high performing team
- Bespoke business consulting

For more information on our practice management programs and how we can help you in your business, contact your dedicated regional manager.

Meet the team.

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Regional Manager – VIC/TAS

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Russell Investments is committed to partnering with you through every stage of your business growth.