



Russell Investments Wealth and Super Series

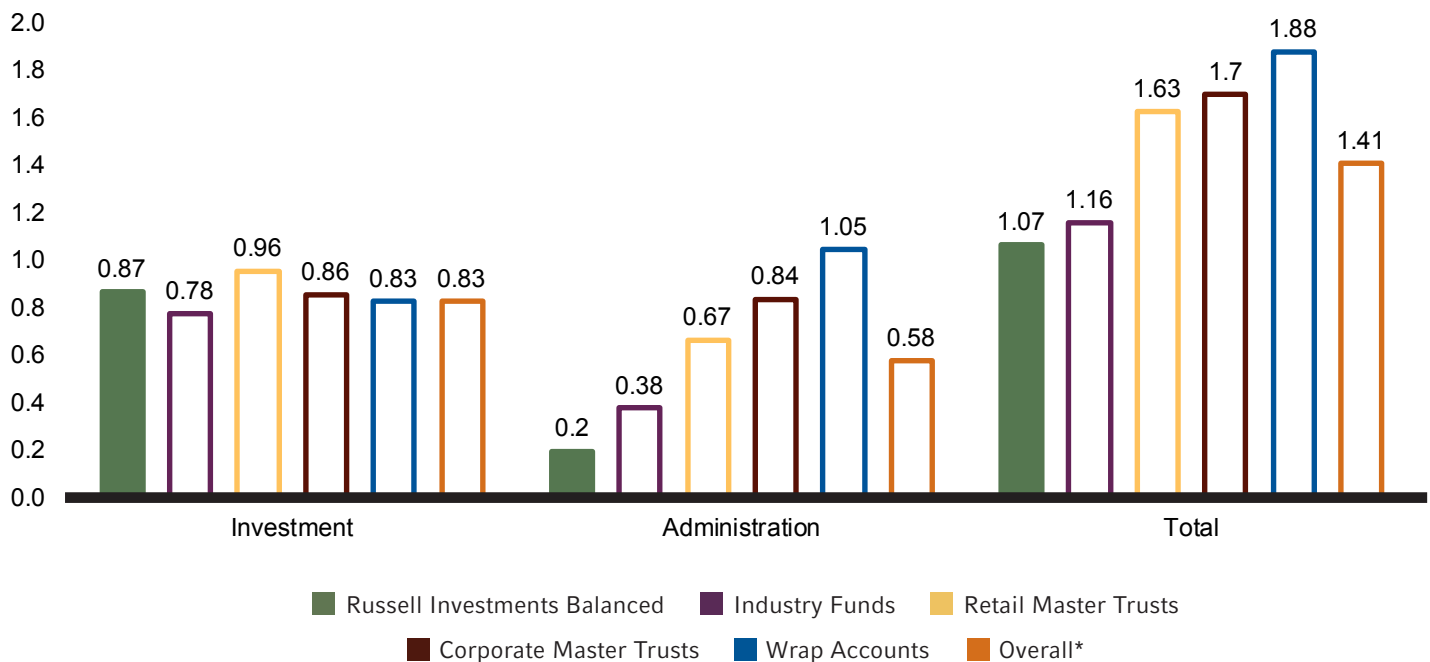
A best of breed investment and platform solution for you and your clients

The Russell Investments 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.

Our fees are amongst the lowest in the industry.

Russell Investments' Wealth and Super series offers investors a world-class best of breed, fully active solution that is very cost effective. Our approach brings together the world's leading investment managers and strategies, in an agile and diversified portfolio, designed to achieve your long-term investment goals.

Russell Investments Balanced Fund via the Wealth and Super Series Average Fees and Costs (%pa)



Source: Russell investments, Chant West – Super Fund Fee Survey, March 2020 based on a \$50,000 account balance. For investment fees, the Chant West Survey focuses on investment options that use a multi-manager sector specialist approach. All fees are gross of income tax and include fees charged and any indirect costs but exclude transaction fees, contribution fees and adviser commissions.

*Overall = AUM weighted average of costs for industry funds, retail master trusts, corporate master trusts and wrap accounts. AUM includes all accumulation, defined benefit and pension assets at 30 June 2019.

Invest with confidence

Russell Investments has been recognised as the **best Multi-Asset Manager by Money magazine** consistently for the past 6 years since 2014.

A leading global investment solutions partner with a unique set of capabilities that we believe is essential to managing your total portfolio to meet your desired outcomes.

Netwealth provide a range of innovative and award-winning investment and superannuation solutions. Netwealth has been recognised as the best in their field, winning the **2019 Investment Trends 2019**. 'Overall Satisfaction with Platform' award.

What sets our approach apart?

Investor focused.

Every decision we make is focused on giving you the best chance of achieving your long-term financial goals.

Insightful.

We embed a huge body of market, manager and investment insight into your portfolios.

Agile.

Our funds can begin protecting assets within minutes. Materially and efficiently.

Diversified.

We broadly and intelligently diversify, drawing on unique return sources. We are not limited to in-house products or single strategies.

Efficient.

We focus on cost minimisation and tax-efficiency - without sacrificing the embedded insight, agility and diversification.

Key benefits



Cost effective

- Competitive administration fees.
- 0.20% p.a. of asset value capped at \$500 p.a.



Efficient client administration

- Consolidated and efficient client reporting.
- Adviser, administration and management login.
- Online and offline access.



Platform features

- Access multiple insurers.
- Term Deposits and cash, including bring your own cash account facilities.
- Eligible life insurance policies and pay premiums from your Wealth Series account.



Investment choice

- Build a diversified investment portfolio using a range of Russell Investments' actively managed multi-asset, single sector and real return funds.
- Term deposit facility.
- Cash account.

Who can benefit?



Fee sensitive clients:

Your clients may not need a full wrap solution, so a competitive admin fee of 0.20% p.a. can be suitable for clients with lower balances.

Equally, a capped admin fee of \$500 p.a. can provide a very competitive fee offering for clients with larger balances.

A compelling and cost effective solution for your fee sensitive clients.



Clients with SMSF needs:

Russell Investments Wealth Series has sophisticated client reporting, including a consolidated annual tax report suitable for all entities, including SMSF Trustees.



Clients planning to or are transitioning to retirement:

Russell Investments Super Series enables clients seeking to transition from super to pension to do so, with no Capital Gains Tax event and no time out of the market.

It also ensures that your clients' retirement wealth is not being eroded by unnecessary fees.



Re-engaging your legacy clients:

This new solution can be the ideal catalyst to target any legacy client and transform them into active clients, and grow their assets through consolidation and ongoing contribution strategies.

Contact Us

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