



Shadforth Financial Group



Personal Wealth Management

Shadforth's Personal Wealth Management service is designed for discerning clients who require financial and investment advice and prefer not to be involved in the intensive management or administration of their investment portfolios.

Our portfolio management clients come from a wide variety of backgrounds, each with different goals and objectives.

With busy professional and personal lives, many simply don't have the time, skill or interest to monitor the performance of their portfolio and maintain complex tax records. Others recognise that this is not the best use of their time. However one thing which unites them all is the desire to enjoy a superior level of service, tailored to their individual needs.

Personal Wealth Management clients receive:

Personal, Customised Advice

With Shadforth as your wealth partner, you will receive the advice and information you need to make astute financial decisions. We'll provide you with ongoing advice that empowers you to manage your financial affairs with confidence.

Investment Administration

We will help you to manage your records on an ongoing basis. This may include action required in response to corporate issues, such as rights offerings of new shares or share buy-back announcements, mergers or acquisitions.

In-Depth Personal Portfolio Reports

You will receive comprehensive portfolio reports tailored to your personal situation. This includes economic and market reports highlighting recent trends in local and global markets, and commentary regarding the potential impact of factors that may affect your financial position.

Regular reviews of your Financial Position

Ensuring the composition and performance of your portfolio remains consistent with your financial goals and objectives and changing personal circumstances over time is an important part of the relationship with your financial adviser.

For this reason we recommend reviews on a regular basis in order to ensure your investment strategy continues to meet your expectations now and into the future as your needs and circumstances change.

Priority Access to your Private Client Adviser

Personal Wealth Management clients are allocated a dedicated private client adviser supported by a client service manager.

This means you can discuss, examine and review your portfolio with your personal financial adviser in confidence whenever you choose. Your adviser is available to respond to any concerns you may have, and to provide you with a qualified perspective in relation to any investment decisions you may be considering.

With Shadforth as your wealth-creation partner, we'll help you to chart a course towards a secure, prosperous future.

THE SHADFORTH ADVANTAGE

Our Personal Wealth Management clients receive comprehensive administration services that make protecting and growing accumulated wealth easier.

This premium service relieves you of the burden of the administration requirements associated with your investments and reporting obligations.

Essentially, we take care of all the paperwork, allowing you more time to focus on the things that are really important to you.

KEY FEATURES AND BENEFITS

Accurate information, improved decision-making

We provide you with up to date information at your finger tips. With secure online access you can view detailed information about your portfolio from anywhere, at anytime.

Portfolio reporting

We keep your portfolio up-to-date on a daily basis. This process applies new transactions, corporate actions and prices to ensure that your portfolio is as current as of the last business day.

Our comprehensive reporting service delivers:

- Transaction reports
- Valuation reports
- Realised Capital Gains Tax (CGT) reports
- Unrealised CGT reports
- Income reports
- Performance reports

Tax Management

Our comprehensive Income and Expense reports assist you with your end of financial year taxation reporting obligations. A complete range of reports are available for the preparation of your income tax return, including:

- Tax summary
- Realised and unrealised Capital Gains Tax (CGT) reports
- Income reports
- Expenses reports

Our Personal Wealth Management service provides you with all the information and resources you need to protect and grow your wealth.

With Shadforth as your wealth partner you will enjoy greater knowledge about your own investment portfolio, insightful information about your portfolio's performance, and the potential taxation implications associated with any decision-making.

Better information allows you to make better decisions.

For further information call 1300 308 440 or visit www.sfg.com.au.

Personal Wealth Management Features

Priority access to your private client adviser for consultation and advice	✓
Ongoing advice and recommendations regarding your investments	✓
Personal portfolio reports tailored to your investments	✓
Regular investment strategy reviews with your private client adviser	✓
Daily sharemarket bulletin and monthly summary newsletter	✓
An investment strategy customised to your financial and lifestyle goals	✓
Comprehensive portfolio analysis and performance tracking	✓
Proactive recommendations relevant to your personal investment profile	✓
Processing of all investment documentation	✓
Income banking and trade settlements	✓
Income tax record keeping	✓
Reporting to enable completion of BAS/IAS statements (if required)	✓
Annual statements for income reconciliation and CGT purposes	✓
Liaison with your accountant as required	✓

*This document should be read in conjunction with our **Financial Services Guide** that contains an overview of our financial services and the kinds of financial products to which those services relate, together with other important information. Ask your adviser if you require another copy of this document.*



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Please call 1300 308 440 or visit www.sfg.com.au.

Details of the services offered by SFG are available in its Financial Services Guide.
A copy of this document will be provided without charge upon request.