

What's new in the profession?

In this section we like to introduce some new tools or services that specifically target the accounting profession. In this article we explore SelfWealth, Australia's first online investment solution tailored for Accountants and their clients.

Now for the first time, investors can measure their portfolio's performance against their peers, professionals and the market for one flat monthly subscription. No more commissions based on how much you have to invest or for services you no longer value. With SelfWealth you can access portfolios, performance, reporting, decision-making tools and your own personalised research engine – all in one place.

SelfWealth has 3 key components to simplify and improve your investing;

Firstly, SelfWealth enables you to view your direct share and cash holdings as a portfolio and measure its performance. SelfWealth will import daily holdings from your online broker or you can setup a manual portfolio and have this tracked daily. Your dashboard provides a snapshot of your current situation at any point in time.

Secondly, the SelfWealth community makes this a unique and powerful tool. Until now it has been almost impossible for investors to compare themselves to anything but a benchmark such as the ASX200. What about comparing yourself to other individuals, or other Self Managed Superannuation Funds?

SelfWealth enables you to do this using the 'League Ladder'. See how you are performing compared to others and then access the intelligence of these investors by 'following' portfolios you find compelling. This allows you to drill down and see the holdings within their portfolio. Not only can you see what the best performers in the community are investing in, you can also access the portfolios of Professional investors. See how they perform and then replicate what works.

The portfolios you 'follow' make up your own unique target portfolio. SelfWealth tracks the performance of this for you. Your target portfolio, if managed closely, tends to outperform your actual portfolio but using the rebalancing function you can replicate your target portfolio at any point in time.

You can view how your actual portfolio has performed compared to your peers, professionals and the market in the performance tab on your dashboard. SelfWealth tracks your actual portfolio against your target portfolio, the ASX200 and even the top performers within the SelfWealth community – this is SelfWealth's own index called the SW200.

Third and finally, The Stock Selector is your own personalized research engine. The SelfWealth Stock Selector comprises two modules: The Strategy Builder, which allows you to build your own investment strategy and back-test the results, and The Value Analyser, which is your own personal tool to look at individual companies.

Dashboard

YOUR PORTFOLIO TARGET PORTFOLIO

Clark Kent

Performance

2.23%

Last 30 Days

9.34% 180 Days
-% 365 Days

5
Lives

7
Follows

68th
Position

Risk Tag



Portfolio: 1

Personal: 4

Your Portfolio Holdings

| Code | Name | Units | Price | Value | % |
|--------------|------------------------|--------|-------|-------------------|---------------|
| CBA | COMMONWEALTH BANK | 735 | 61.61 | 45,283.35 | 13.49 |
| BHP | BHP BILLITON LIMITED | 1,270 | 37.41 | 47,510.70 | 14.16 |
| CTO | CITIGOLD CORP LTD | 10,870 | 0.05 | 586.98 | 0.17 |
| RIO | RIO TINTO LIMITED | 457 | 67.10 | 30,664.70 | 9.14 |
| SLF | SPDR S&P/ASX PROF FUND | 3,000 | 8.95 | 26,850.00 | 8.00 |
| TAH | TABCORP HOLDINGS LTD | 1,830 | 3.01 | 5,508.30 | 1.64 |
| TLS | TELSTRA CORPORATION | 7,022 | 4.48 | 31,458.56 | 9.37 |
| WBC | WESTPAC BANKING CORP | 1,416 | 26.60 | 37,665.60 | 11.22 |
| WES | WESFARMERS LIMITED | 208 | 37.47 | 7,793.76 | 2.32 |
| WOW | WOOLWORTHS LIMITED | 1,492 | 30.02 | 44,789.84 | 13.35 |
| CSL | CSL LIMITED | 1,087 | 52.39 | 56,947.93 | 16.97 |
| SCP | SCA PROPERTY GROUP | 328 | 1.53 | 500.20 | 0.15 |
| Total | | | | 335,559.92 | 100.00 |

SelfWealth

Investing with Intelligence

So, how can SelfWealth help Accountants?

1. Help your clients have better control over their investments

Within SelfWealth, every portfolio is clearly benchmarked against the market and other SelfWealth subscribers providing complete transparency of performance. This transparency teamed with the many decision-making tools within SelfWealth provides investors with control over their portfolios and gives them the potential to improve returns.

2. SelfWealth will help with the engagement and retention of your client base

Have you heard clients complain they are sick and tired of paying fees and commissions to fund managers, financial planners and administration platforms for services they don't see value in? You can now offer your clients SelfWealth as an alternative.

3. Grow your client base.

Looking for ways to further engage your Gen X and Gen Y clients? With the increasing popularity of social forums and online communities, SelfWealth really appeals to this demographic. Demonstrate your understanding of your clients needs and be an early adopter of this cutting edge online solution.

4. Independent

There is no association with any institution and therefore no product push.

5. No RG146 qualification is required

SelfWealth is not a traditional product or platform, it is an online investment solution; therefore accountants are free to discuss and talk about SelfWealth, consistent with ASIC guidelines.

6. Assist with the obligations and responsibilities of SMSF trustees

SelfWealth can provide you with the necessary documentation regarding SelfWealth catering for the investment strategy for Self Managed Super Funds.

7. SelfWealth provide you with Marketing Resources and Training

SelfWealth provides Accountants with marketing collateral for your office reception area and your clients.

8. Additional Revenue Stream.

SelfWealth welcomes partnerships with Accountants and can provide an additional revenue stream. For more information or to set up a demonstration, visit www.selfwealth.com.au, email info@selfwealth.com.au or call 1300 855 860.