

A leading provider of investment services to financial advisers, stockbroking firms, accountants, financial institutions and their clients.

OUR BUSINESS

We are one of Australia's leading providers of investment services to financial intermediaries. We provide products and services to financial advisers, brokers, accountants and financial institutions offering trading, gearing, cash and portfolio services to Australian investors.

Our clients range from small advisory firms through to some of Australia's largest financial institutions. We currently provide investment solutions to over 800 Dealer Groups and 10,000 advisers in every State and Territory of the country.

“ WITH ROOTS STRETCHING BACK TO 1994, WE REPRESENT SOME OF THE PIONEERS IN AUSTRALIAN INVESTMENT SERVICES. ”

With roots stretching back to 1994, CommSec Adviser Services represents the consolidation and experience of some of the pioneers in Australian investment services.

Working with advisers over so many years, we have grown to intimately understand their clients' requirements. This places us in the unique position of being able to provide you with powerful products and services as well as relevant support to help them operate more effectively.

OUR SOLUTIONS

We support advisers with products and services to help them provide trading, cash, gearing and portfolio management solutions to you, the investor.

Plus, having all your products in the one place means more convenience for you, and more confidence.

SECURITY & SCALE

CommSec Adviser Services is part of the Commonwealth Bank of Australia Group (CBA). This allows us to leverage the Group's expertise, resources and commitment to ensure our products suit your needs.

So you can rest easy knowing you will benefit from the strength and security that comes with working with one of Australia's leading financial institutions.

OUR PRODUCTS AND SERVICES



TRADING SOLUTIONS

The experience and innovation of the CommSec online trading platform enhanced with additional features for advisers and their clients.



CASH MANAGEMENT

Safe, simple, powerful cash management for advised investors and Self-Managed Super Funds.



INVESTMENT LENDING

A tax-effective loan facility that gives you the ability to use your existing investments or cash to build a larger portfolio of shares and managed funds, potentially improving your investment returns.



MODEL PORTFOLIOS

CommSec Investment Management offers a number of pre-defined portfolios to suit your investment objectives and risk profiles. Our low-cost Australian Equity portfolios are constructed incorporating top-down and bottom-up analysis. Each portfolio is regularly reviewed in line with the investment strategy by the team who also provide regular performance reports.



BESPOKE PORTFOLIOS

CommSec Investment Management offers a bespoke portfolio solution whereby a portfolio is constructed to suit your circumstances. You and your adviser can have as much, or as little involvement in the construction as you desire. Once implemented, the team will keep your adviser informed of significant events such as recommendation changes, corporate actions and major announcements.



PORTFOLIO SERVICE

CommSec Adviser Services and Colonial First State have come together to create a unique way to administer your portfolio. This innovative solution will provide a cost-effective administration service to help you and your adviser manage custodial and directly held assets together all in one place.



COMMSEC INVESTMENT MANAGEMENT TEAM

CommSec Investment Management is a specialist provider of Australian Equity Bespoke and Model Portfolios. Concentrating on the intermediary market the team's key strengths include portfolio construction, portfolio management and research services.

WHY CHOOSE COMMSEC ADVISER SERVICES?



HERITAGE

Our roots in wholesale investment solutions can be traced back to 1994.



PRODUCTS

We have a broad range of products to meet almost any investment need.



EXPERIENCE

We bring together the skills of many of the pioneers in wholesale broking and gearing.



CONVENIENCE

Access all our products, services and logins in one convenient place.



SERVICE

Superior service from our dedicated teams through one convenient phone number.

For more information on the CommSec Adviser Services products and how they can help you, speak to your financial adviser.

Phone: 1800 252 351

Email: CommSecAdviserServices@cba.com.au

Web: CommSecAdviserServices.com.au

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