

Choose CommSec Adviser Services and you'll benefit from the innovation that comes from our CommSec DNA, enhanced with features and services for financial advisers investing on behalf of their clients.

Our broad product range and in-depth knowledge of the intermediary market and the challenges they face puts us in the perfect position to be able to support your needs. 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 throughout Australia.



## TRADING

We've taken the strength of the market leading CommSec trading platform and enhanced it with additional features for advisers trading on behalf of their clients.



## CASH MANAGEMENT

Our Cash Management Service, consisting of the Commonwealth Bank's Accelerator Cash Account (ACA) and Term Deposit, acts as a single investment cash flow hub for investors, SMSFs and their advisers.

Stay in control of your administration and auditing with online account access or ACA data feeds to Class Super, GBST, BankLink, XPLAN and VisiPlan.



## INVESTMENT LOAN

Your client can leverage their cash or existing investment portfolio by using our award winning Investment Loan to borrow and invest in shares, exchange traded funds and unlisted managed funds.

Enjoy investment flexibility with over 500 ASX listed securities, 1,600 managed funds and 350 investment platforms and SMAs on our accepted securities list.



## CALIA+

CALIA+ is a flexible all-in-one loan facility that enables your clients to take advantage of the equity locked up in their home and other properties for both personal and wealth creation purposes. It allows you to manage their home, investment and personal loans in a single loan facility.



## MANAGED ACCOUNTS

CommSec Investment Management's Managed Accounts are an efficient and cost effective way for your clients to access professionally managed investment portfolios. The CommSec Investment Management team controls all investment decisions which reduces the administrative and compliance burdens to you.



## MODEL PORTFOLIOS

CommSec Investment Management offers a number of pre-defined portfolios to suit your clients' 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 PORTFOLIO

CommSec Investment Management offers a bespoke portfolio solution whereby a portfolio is constructed to suit your client's circumstances. You and your client can have as much, or as little involvement in the construction as you desire. Once implemented, the team will keep you 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 clients' portfolios. This innovative solution will provide a cost-effective administration service to help you 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 Managed Accounts and Bespoke and Model Portfolios. Concentrating on the intermediary market the team's key strengths include portfolio construction, portfolio management and research services.

For more information about our products and services, please visit [www.CommSecAdviserServices.com.au](http://www.CommSecAdviserServices.com.au), contact your CommSec Adviser Services Business Development Manager or call us on **1800 252 351**.