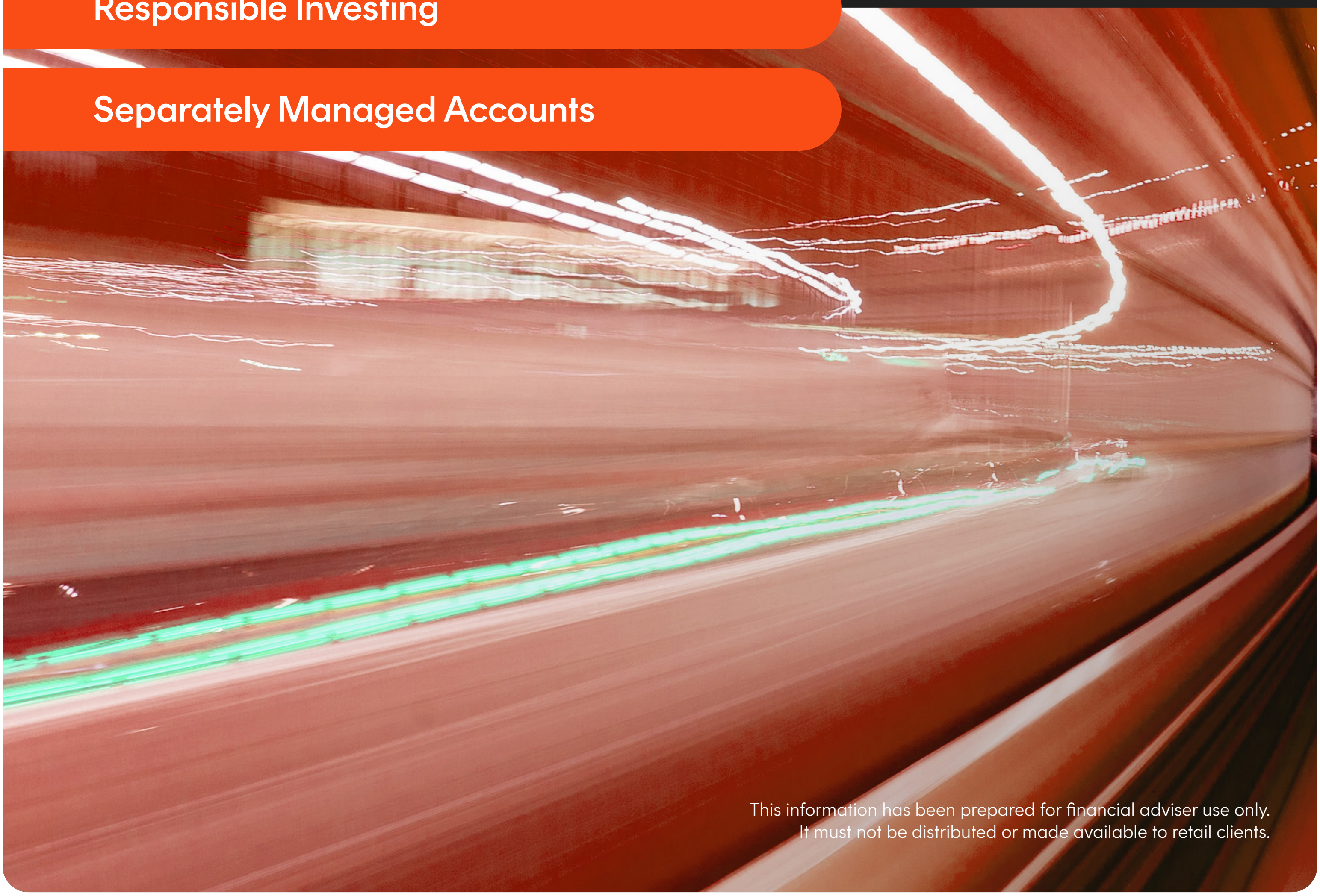
betashares

Business Acceleration Services

- Portfolio Analytics & Construction
- Practice Development & Marketing Support
- Capital Markets Insights
- Responsible Investing
- Separately Managed Accounts



“Growth through partnership”

A new range of support tools and services designed to give your business an edge when it comes to engaging with clients and driving growth strategies.

Growing compliance requirements coupled with a changing regulatory environment have shifted the goal posts for many financial services businesses. Being short on time can rob you of the chance to analyse, review and improve how your firm operates.

At Betashares, we are dedicated to serving you and supporting your clients in reaching their investing goals.

Founded in Australia, with solutions in every major asset class, we know what it takes to succeed in the Australasian market. Our insights and expertise have allowed us to develop a unique mix of services designed to assist you in running your business. Whatever your goals are, we are here to help.

We can support you and your team by helping with the technical aspects of investing client funds and building an investment philosophy, engaging with clients, and enhancing your marketing plans.

Our Adviser Services team can work with you to build a bespoke approach for your business in the following five areas:

Portfolio Analytics and Construction:

- Asset allocation and correlation analysis
- ETF and fund performance attribution (risk and return)
- On-going monitoring and reporting
- Portfolio construction ideas

Practice Development and Marketing Support:

- Marketing consultancy session (including marketing and growth plans, goals and determining a future vision)
- Advice on channel and execution strategies
- Analysing current marketing operations (website analytics, CRM databases, email marketing, and social media)
- Increasing brand awareness
- Increasing lead generation - via existing clients and prospects
- A summary of marketing recommendations and an action plan
- Staff recruitment advice
- Developing a Client Value Proposition (CVP)
- Understanding behavioural finance
- Developing and implementing an investment philosophy

Capital Markets Insights:

- Economic and market outlooks
- Asset class education and trends
- Trading execution
- Portfolio positioning across economic cycles
- Investment committee assistance and input

Responsible Investing:

- Client type identification
- Client tools and ESG fact find tool
- Learning more about stewardship
- Engagement and client reporting
- Portfolio implementation solutions

Separately Managed Accounts:

- Provide an outsourced portfolio solution at the practice level, specific client segments or for the core part of client portfolios
- Accessible across multiple major platform solutions with comprehensive administrative support
- Reduce time and resources to portfolio management, help to enhance practice profitability
- Supported by thorough reporting, commentary and support tools that can strengthen client relationships
- Managed by an experienced investment committee that utilises dynamic asset allocation and smart beta strategies

Contact your Betashares account manager to find out more about your eligibility for our Business Acceleration Services.

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Discover more

Betashares Practice Development

Tools and insights to help you run a more efficient practice and deliver better client outcomes.

'Practice Makes Perfect 'video series

Adviser Resources

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