

# Delivering strategic solutions in wealth



## A broad spectrum of fit-for-purpose services to financial advice and private wealth organisations, built around your business and investment needs.

WTW's specialist Wealth Consulting team helps deliver better outcomes for your clients. You can benefit from our model portfolios and Separately Managed Accounts (SMAs), providing advice and Approved Product List (APL) formalisation, and best-in-class global fund solutions suitable for wealth groups.

### Your strategic partner

Through our tailored investment advice and range of solutions, we help you achieve your desired future state.

With WTW as your **strategic partner**, you can focus on growing your existing business and increasing scale, while tapping into our vast global investment research capabilities. Leverage our innovative and differentiated research expertise to drive better outcomes for your clients.

### Levelling the playing field

We know there are important differences between (retail and/or wholesale) wealth investors and institutions such as superannuation. WTW believes that more can be done to ensure an equal playing field.

Our unparalleled **scale, infrastructure, and experience**, gives you access to investment strategy expertise and a network of the world's best asset managers – all while significantly improving implementation outcomes and reducing costs to your clients.

**Ranked #1 in the Crisil Coalition Greenwich Client Survey for the following research and advisory categories:**

-  **Investment Strategy**
-  **Risk Advice**
-  **Dynamic Asset Allocation**
-  **Sustainability Advice**


**Retaining #1 Relationship Strength position consistently in 2020, 2021, 2022<sup>^</sup>, 2023<sup>^</sup> and 2024.**

<sup>^</sup>Ranked equal first (=1) in 2022 and 2023.

**Crisil**  
Coalition  
Greenwich

Advice	Implementation	Investment Solutions
<ul style="list-style-type: none"><li>Investment strategy and asset allocation (Strategic and Dynamic Asset Allocation)</li><li>Objectives setting and investment policy development</li><li>Portfolio construction and global investment ideas generation</li><li>Global Manager Research network: asset class/capital markets research</li><li>Investment Committee advice and engagement</li><li>Sustainable investment and ESG modelling and research</li><li>Asset Class, Strategy Reviews and Health Checks</li></ul>	<ul style="list-style-type: none"><li>Implemented Consulting services combine our advisory services with portfolio management, operations and monitoring/reporting</li><li>Tailored investment portfolios, with access to an unconstrained, global universe of investment opportunities</li><li>Seamlessly implemented investment strategy, ensure your portfolio is effectively managed, via our dedicated portfolio management and operations teams</li><li>Integrate Impact Investments and ESG considerations throughout the investment process</li></ul>	<ul style="list-style-type: none"><li><b>Multi-asset Funds:</b> WTW's diversified portfolios, providing access to an institutional quality portfolio</li><li><b>Global Equity Focus Fund:</b> Increasing the likelihood of reliable alpha through a high active share, concentrated global equity portfolio</li><li><b>Alternative Credit Fund:</b> Complementing traditional fixed income by investing across the credit spectrum in a variety of strategies</li><li><b>Private Markets:</b> Accessin our best global ideas across the Private Markets spectrum, including real estate, infrastructure, private equity and private credit.</li><li><b>Hedge Advantage Fund:</b> A dynamic multi-manager fund investing in a portfolio of actively managed and innovative hedge funds</li></ul>

## What you need and how we can help

You need:		We can offer:
	A well-resourced partner with experience in the IFA space	<ul style="list-style-type: none"> <li>Significant local and global capabilities covering manager research, investment strategy and portfolio management</li> <li>Existing Australian wealth market experience in bringing institutional-grade investment capabilities to IFAs</li> <li>A true partnership that is aligned with your investment philosophy</li> </ul>
	Competitive long-term returns	<p>A track record of achieving strong risk-adjusted returns for our clients via:</p> <ul style="list-style-type: none"> <li>long-term outperformance from manager selection</li> <li>dynamic asset allocation advice which has added return and reduced risk in volatile investment markets.</li> </ul>
	Effective implementation	<ul style="list-style-type: none"> <li>Operational and portfolio management capabilities to create managed account or other investment solutions, and manage platform relationships</li> <li>Scale to negotiate highly competitive fees on behalf of your clients with the world's leading investment managers</li> </ul>

## A longstanding partnership: WTW and MGD Wealth

MGD Wealth is a Brisbane-based financial planning firm with \$2 billion under advice and \$430 million under management, across 13 advisers. WTW and MGD share a similar investment philosophy and have been in strategic partnership since 2017. WTW provides MGD Wealth with the following:

- Investment management for three multi-asset funds, across the risk-return spectrum
- Investment management and support of separately managed accounts on retail platforms
- Broader investment consulting support including access to investment content
- Operational support for all funds

By utilising WTW and delegating these functions, over the last seven years, MGD Wealth has been able to focus its attention on what's most important to its core business – engaging with advisers and both existing and new clients. MGD has therefore been able to grow its business significantly and deliver an overall higher quality service.

This example illustrates the breadth and scale of WTW's strategic partnerships, whether we are helping Wealth clients to build better, more diverse portfolios or provide extensive global research at a competitive cost point.

## Why WTW?

Our strategic partnership provides you with our best ideas that shape your clients' investment strategy and lead to better outcomes. You reap the benefits from leveraging WTW's high quality strategy and research expertise.

Global Assets	AUM Australia, Asia + Global split			
<b>AUA</b>	<b>AUM</b>	<b>Australia</b>	<b>Asia</b>	<b>Global</b>
<b>\$4.8</b>	<b>\$241</b>	<b>\$1.85b</b>	<b>\$3b</b>	<b>\$235b</b>
trillion	billion			

We have

**46,000**

employees

Serving more than

**140**

Countries and markets.





Clients

**+1400**

Globally

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**About WTW**

At WTW (NASDAQ: WTW), we provide data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of our colleagues serving 140 countries and markets, we help you sharpen your strategy, enhance organisational resilience, motivate your workforce and maximize performance.

Working shoulder to shoulder with you, we uncover opportunities for sustainable success—and provide perspective that moves you.

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