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

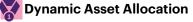
We know there are important differences between (retail and/or wholesale) wealth investors and institutions such as superannuation. WTW believes that more can be done to ensure an equal playing field.

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:









Retaining #1 Relationship Strength position consistently in 2020, 2021, 2022[^], 2023[^] and 2024.

^Ranked equal first (=1) in 2022 and 2023.



Advice

- Investment strategy and asset allocation (Strategic and Dynamic Asset Allocation)
- Objectives setting and investment policy development
- Portfolio construction and global investment ideas generation
- Global Manager Research network: asset class/capital markets research
- Investment Committee advice and engagement
- Sustainable investment and ESG modelling and research
- Asset Class, Strategy Reviews and Health Checks

Implementation

- Implemented Consulting services combine our advisory services with portfolio management, operations and monitoring/reporting
- Tailored investment portfolios, with access to an unconstrained, global universe of investment opportunities
- Seamlessly implemented investment strategy, ensure your portfolio is effectively managed, via our dedicated portfolio management and operations teams
- Integrate Impact Investments and ESG considerations throughout the investment process

Investment Solutions

- Multi-asset Funds: WTW's diversified portfolios, providing access to an institutional quality portfolio
- Global Equity Focus Fund: Increasing the likelihood of reliable alpha through a high active share, concentrated global equity portfolio
- Alternative Credit Fund: Complementing traditional fixed income by investing across the credit spectrum in a variety of strategies
- Private Markets: Accessin our best global ideas across the Private Markets spectrum, including real estate, infraestructure, private equity and private credit.
- Hedge Advantage Fund: A dynamic multimanager fund investing in a portfolio of actively managed and innovative hedge funds



What you need and how we can help

You need: We can offer: · Significant local and global capabilities covering manager research, investment strategy and portfolio management A well-resourced partner with • Existing Australian wealth market experience in bringing institutional-grade experience in the IFA space investment capabilities to IFAs A true partnership that is aligned with your investment philosophy A track record of achieving strong risk-adjusted returns for our clients via: long-term outperformance from manager selection Competitive long-term returns dynamic asset allocation advice which has added return and reduced risk in volatile investment markets. · Operational and portfolio management capabilities to create managed account or other investment solutions, and manage platform relationships **Effective** implementation Scale to negotiate highly competitive fees on behalf of your clients with the world's leading investment managers

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			
AUA	\$241	Australia	Asia	Global
\$4.8		\$1.85b	\$3b	\$235b





For more information, please contact your WTW consultants:



Aongus O'Gorman

Senior Director, Australia aongus.ogorman@wtwco.com



Jasper Yeghiaian-Alvandi

Analyst, Investments jasper.yeghiaian-alvandi@wtwco.com



Heidi Hargrave

Director, Investments heidi.hargrave@wtwco.com

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.

Towers Watson Australia Pty Ltd ABN 45 002 415 349 AFSL 229921 ("WTW") has prepared this material for general information purposes only and it should not be considered a substitute for specific professional advice. In particular, its contents are not intended by WTW to be construed as the provision of investment, legal, accounting, tax or other professional advice or recommendations of any kind, or to form the basis of any decision to do or to refrain from doing anything. As such, this material should not be relied upon for investment or other financial decisions and no such decisions should be taken based on its contents without seeking specific advice.

This material is based on information available to WTW at the date of this material and takes no account of developments after that date. In preparing this material we have relied upon data supplied to us or our affiliates by third parties. Whilst reasonable care has been taken to gauge the reliability of this data, we provide no guarantee as to the accuracy or completeness of this data and WTW and its affiliates and their respective directors, officers and employees accept no responsibility and will not be liable for any errors, omissions or misrepresentations by any third party in respect of such data.

This material may not be reproduced or distributed to any other party, whether in whole or in part, without WTW's prior written permission, except as may be required by law. In the absence of our express written agreement to the contrary, WTW and its affiliates and their respective directors, officers and employees accept no responsibility and will not be liable for any consequences howsoever arising from any use of or reliance on this material or any of its contents. WTW may enter into transactions with, and use the services of, any of our related bodies corporate. Such arrangements will be based on arm's length commercial terms. Copyright © 2023 WTW. All rights reserved.







wtwco.com/social-media

Copyright © 2025 WTW. All rights reserved. WTW-904AU

