



A POWERFUL COMPLETE DIRECT EQUITIES SERVICE

# MASON STEVENS

Today's investor is demanding more - greater control, tax efficiency and transparency from their portfolios. In response, many have increased their focus on direct equities.

Advisers must respond if they want to stay relevant in this new wealth management environment. The challenge is how to create a scalable direct equities solution that doesn't chew up all your time or drown your business with excessive costs.

Mason Stevens has the answer. Power your business with our comprehensive direct equities solution that encompasses Managed Accounts, tailored equity portfolios and structured products.

With Mason Stevens you can meet client demand and increase your scale with a tailored solution to your specific business needs.

## THE CHALLENGE FOR ADVISERS

Direct equity investments have many advantages over traditional unit trust structures. But implementing and managing share portfolios can be challenging.

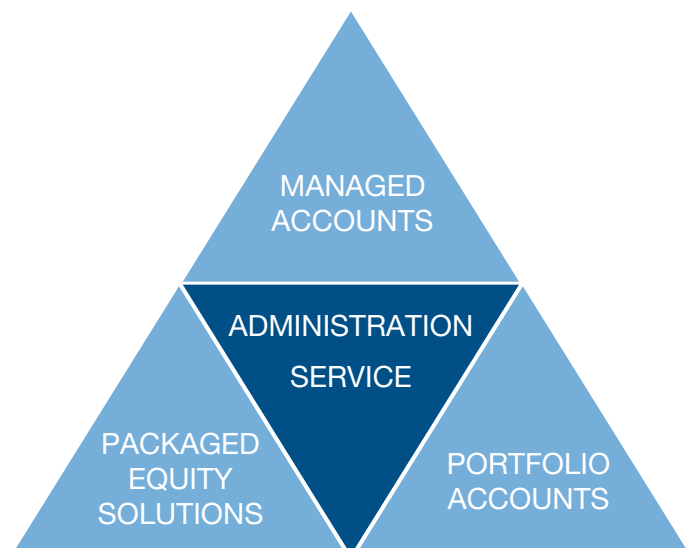
Consider the time and effort it takes to implement a single trade for one client. Multiply that across many clients with many different trades and you are facing a time consuming problem. Advising clients on stock-specific transactions can also add risk to your business and upset your risk profiling.

## SOLVING THE PROBLEM WITH MASON STEVENS

Our comprehensive service offers managed accounts, direct equities and structured products all via the one administration service.

We provide you with the infrastructure you need to offer a comprehensive direct equities solution to your clients. In turn, it frees you up to focus on client servicing and relationship building.

Mason Stevens is a boutique investment management firm that is committed to providing a transparent and complete equity solution for advisers and their clients.



## MANAGED ACCOUNTS

Managed Accounts are a highly effective method for investing in equities. Their many benefits include professional management, transparency and tax efficiency.

You can choose from our range of best of breed investment managers or from the portfolios offered by Mason Stevens Asset Management.

Our investment capabilities span domestic and international equities, equity derivatives, fixed income securities, hybrids and bonds. We are one of the first Managed Account providers to offer a transparent, individual international equity solution.

## PORTFOLIO ACCOUNT (TAILORED EQUITIES)

Clients and advisers who want to structure their own tailored equity portfolios can use our Portfolio Account service.

This could take the form of a single client structuring their own investments, or an adviser setting up their own portfolios to use with their entire client base.

These portfolios can be managed independently or with the help of the Mason Stevens Wealth Management team.

## PACKAGED EQUITY SOLUTIONS (STRUCTURED PRODUCTS)

Advisers can enhance portfolio performance with our structured product solutions. They might be useful for:

- transition to retirement strategies
- repairing SMSF balance sheets
- tax management strategies
- wealth accumulation.

We have access to a broad range of product providers. This enables us to structure the best and most competitive products for our clients.

## ADMINISTRATION SERVICE

All Mason Stevens products are offered via our online administration service. It provides advisers and their clients with 24 hour access to their personalised investment information and comprehensive reporting, providing complete transparency.

Importantly, 24 hour online access encourages client engagement with their portfolios and satisfaction with their wealth management strategy.

Our full custodial service relieves the administration burden for advisers by reducing back office equity needs. It also fully integrates with XPLAN for easy practice management.

## Benefits for your clients

- ✓ Online reporting 24 hours a day
- ✓ Access to direct equities
- ✓ Access to investment expertise
- ✓ Individual, not pooled, ownership
- ✓ Fair tax outcomes

## Benefits for you

- ✓ Tailored to your practice
- ✓ Broad product choice
- ✓ Easy administration
- ✓ Access to investment expertise
- ✓ Integrates with XPLAN
- ✓ Scalable business platform
- ✓ More engaged clients

## TAILORED FOR YOUR BUSINESS

One of the great advantages of choosing Mason Stevens is that we can work with you to design a direct equities solution tailored to your specific business needs.

We have helped a number of practices assess their approach to direct equities and then implement the right strategy to suit their investment process.

This includes helping some practices construct and run their own investment committee. Some of our clients are even choosing to brand the products under their own company name.

This flexibility enables you to improve your offering, achieve scale and enhance efficiencies.

## CONTACT

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