



THE COMPLETE MULTI ASSET INVESTMENT SOLUTION

MASON STEVENS

Do you find yourself wanting more from your investment portfolio? More control, greater transparency and fairer tax outcomes? Perhaps you want to protect your capital as you pursue investment returns?

Mason Stevens provides the answer with our comprehensive multi asset, multi currency investment solution.

We bring together managed accounts, tailored equities and high-yielding, fixed income portfolios on one easy to use platform.

You can construct a portfolio tailored to your individual objectives and risk appetite, or you can invest via our ready made managed accounts.

Importantly, we can work with your existing advisers to meet your financial needs.

Discover a smarter way to invest with Mason Stevens.

THE POWER OF AN INVESTMENT HOUSE

Mason Stevens provides sophisticated investors with access to a range of investment opportunities including equities, derivatives, fixed income, hybrids and bonds. Our investments are offered via Portfolio Accounts and Managed Accounts.

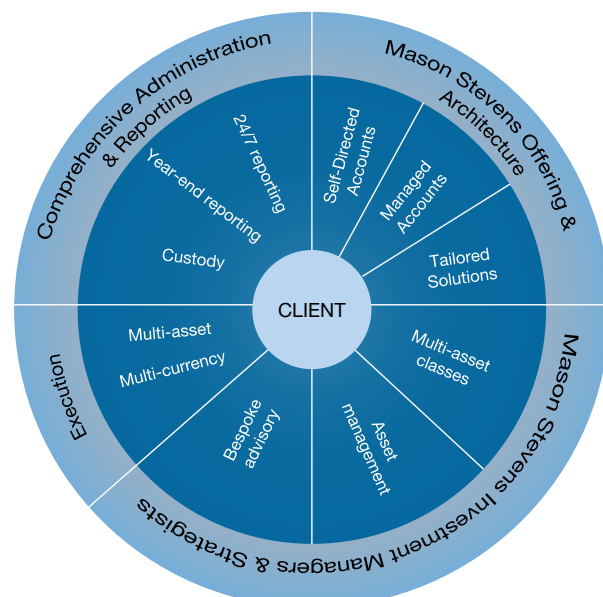
Regardless of whether you invest directly, via a self-managed super fund or through a corporate entity, you can choose from these investments to build a portfolio tailored to your needs and asset allocation preferences.

Importantly, you can log on to our transparent, client-centric platform at any time to view comprehensive portfolio administration, performance information and tax reporting.

MEETING THE NEEDS OF INVESTORS

Our offering is focussed on meeting three key investor needs:

- Access to professional investment management expertise across global asset classes
- Bespoke advice relating to portfolio construction, capital protection and opportunistic investment themes
- Wealth management services encompassing equities and fixed income advice, research and IPOs, investment idea generation and access to financing solutions.



CHOOSE YOUR INVESTMENT STRUCTURE

When you invest with Mason Stevens you can choose to build your own portfolio using our Portfolio Accounts service, or you can access the investment expertise available via our Managed Accounts. These options are set out below.

MASON STEVENS MANAGED ACCOUNTS

Managed Accounts are a highly effective method for investing in a range of assets classes. 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 team.

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

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

MASON STEVENS PORTFOLIO ACCOUNTS

With our Portfolio Accounts you can build your own bespoke equity portfolio with your choice of investments.

These portfolios can be managed independently or with the help of the Mason Stevens Private Investments team.

WHY MASON STEVENS

As a private client of Mason Stevens you will receive:

- Access to global markets and the expertise of our leading investment partners
- Personalised and transparent outcomes
- Exclusive investment opportunities generated by our institutional approach to managing the wealth of sophisticated clients
- A competitive fee structure that allows you to control and transact in the manner that best suits your needs
- Beneficial ownership of your assets (via a custodian).

Key Benefits

- ✓ Access to multiple asset classes
- ✓ Professional investment expertise
- ✓ Fair tax outcomes
- ✓ Tailored solutions
- ✓ No fuss, transparent online reporting
- ✓ Competitive fee structure

ABOUT MASON STEVENS

Mason Stevens is an investment house that aims to deliver institutional style solutions to a niche, sophisticated client base on a transparent, efficient and cost effective basis

The business was established in early 2010 by experienced individuals who saw an opportunity to provide Australian investors with a more sophisticated investment offering

Our founders, who have previously built a similar business, have extensive experience in global equities, derivatives, debt and financial markets.

We hold an Australian Financial Services Licence authorising the provision of investment advice and execution across a broad suite of financial products.

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