

ASX FIND AN ADVISER STATISTICS.

March 2022 (all information as at 27 January 2022)

WHAT IS ASX FIND AN ADVISER?

Find an adviser

Welcome to the ASX Find an Adviser website, where you can take the first step to finding a financial adviser to help you identify and achieve your financial goals. Start your search now by simply entering your suburb to find an adviser near you.

Location Distance 10km Amount to invest Unsure

Enter your suburb or postcode   Search

- A portal to generate potential client leads from the ASX website

WHAT IS ASX FIND AN ADVISER?

ASX

Location: Melbourne, VIC 3000

Distance: 0 - 10km

Amount to invest: \$500k - \$1m

ASX Trading Participant: All

45 advisers found ⓘ Information about the search results

Sort by: Adviser Location Distance

Adviser	Services	Location	Distance
BELL POTTER	Shares ETFs LICs mFund Bonds Hybrids Warrants Options	Melbourne, VIC 3000	0.7km
EVANS & PARTNERS	Shares ETFs LICs mFund Bonds Hybrids Warrants Options	Melbourne, VIC 3000	0.6km
BELL POTTER	Shares ETFs LICs mFund Bonds Hybrids Warrants Options	Melbourne, VIC 3000	0.7km
morgans	Shares ETFs LICs mFund Bonds Hybrids Warrants Options	Melbourne, VIC 3004	2.7km
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BELL POTTER	Shares ETFs LICs mFund Bonds Hybrids Warrants Options	Melbourne, VIC 3000	0.7km

- Potential leads put in their location, distance and amount they are wanting to invest to find a list of potential advisers at different firms

WHAT IS ASX FIND AN ADVISER?

The screenshot shows the ASX Find an Adviser profile for Bell Potter. At the top left is the Bell Potter logo. To its right, the 'Adviser name' is 'ASICARN'. Below the name is the office location: 'Level 29, 101 Collins St, Melbourne, VIC 3000' with a '0km' distance indicator. The main section is titled 'Customised bio' and contains a 'Qualifications' button. Below this, the 'Licensed for' section lists 'Shares', 'ETFs', 'LICs', 'Hybrids', 'Warrants', and 'Options', all with checked status. At the bottom of the bio section, it says 'Bell Potter AFSL 243480'. A paragraph of text follows: 'Bell Potter Securities is a leading full-service Australian stockbroking, investment and financial advisory firm. Founded in 1970, Bell Potter has grown to a total staff of 600, operates across thirteen offices in Australia and has offices in London, New York and Hong Kong. Bell Potter is a part of the Bell Financial Group of companies (ASX:BFG). We cultivate long-standing relationships with our clients through the provision of high quality, professional advice to private investors. Our strength lies in being able to provide focused investment solutions which meet our client's investment goals: to build and preserve their wealth. Learn more about our service offering by visiting [Bell Potter](#).' At the bottom of the profile are three buttons: 'Show Number', 'Learn More', and 'Get in touch'.

Customise your profile

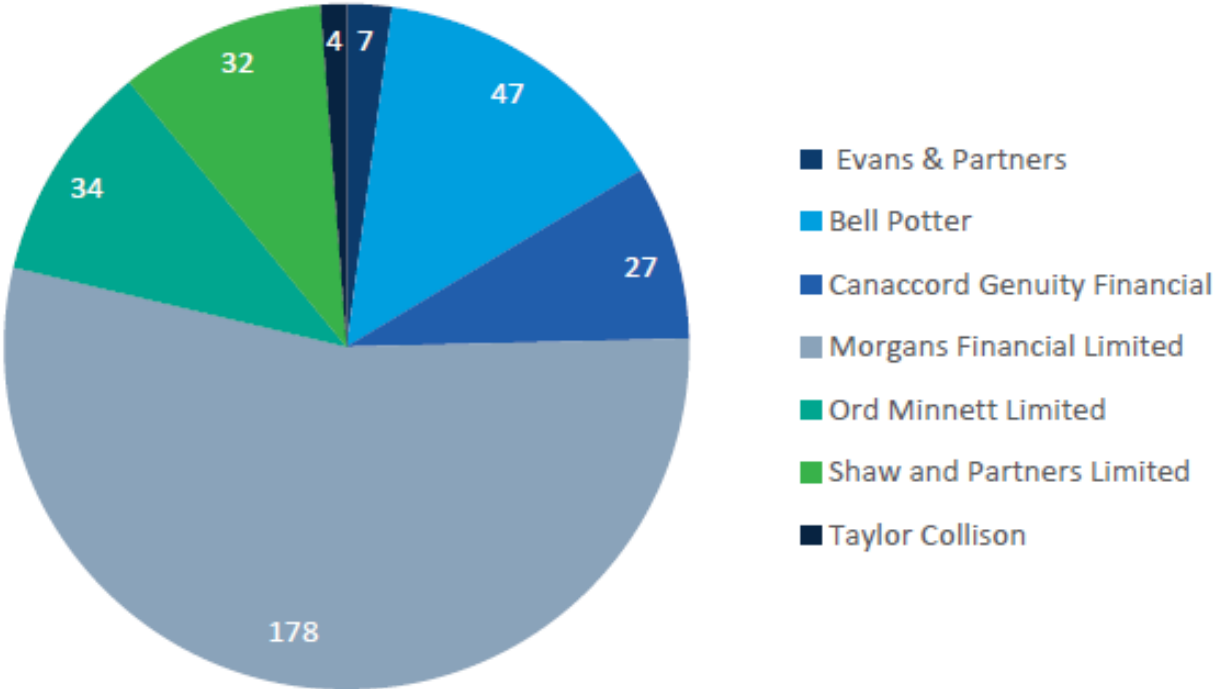
- Service offerings
- Minimum investment amount
- Customised bio (a way to differentiate yourself from other advisers on the platform)
- Qualifications
- Office location

PARTICIPATING FIRMS AND ADVISERS

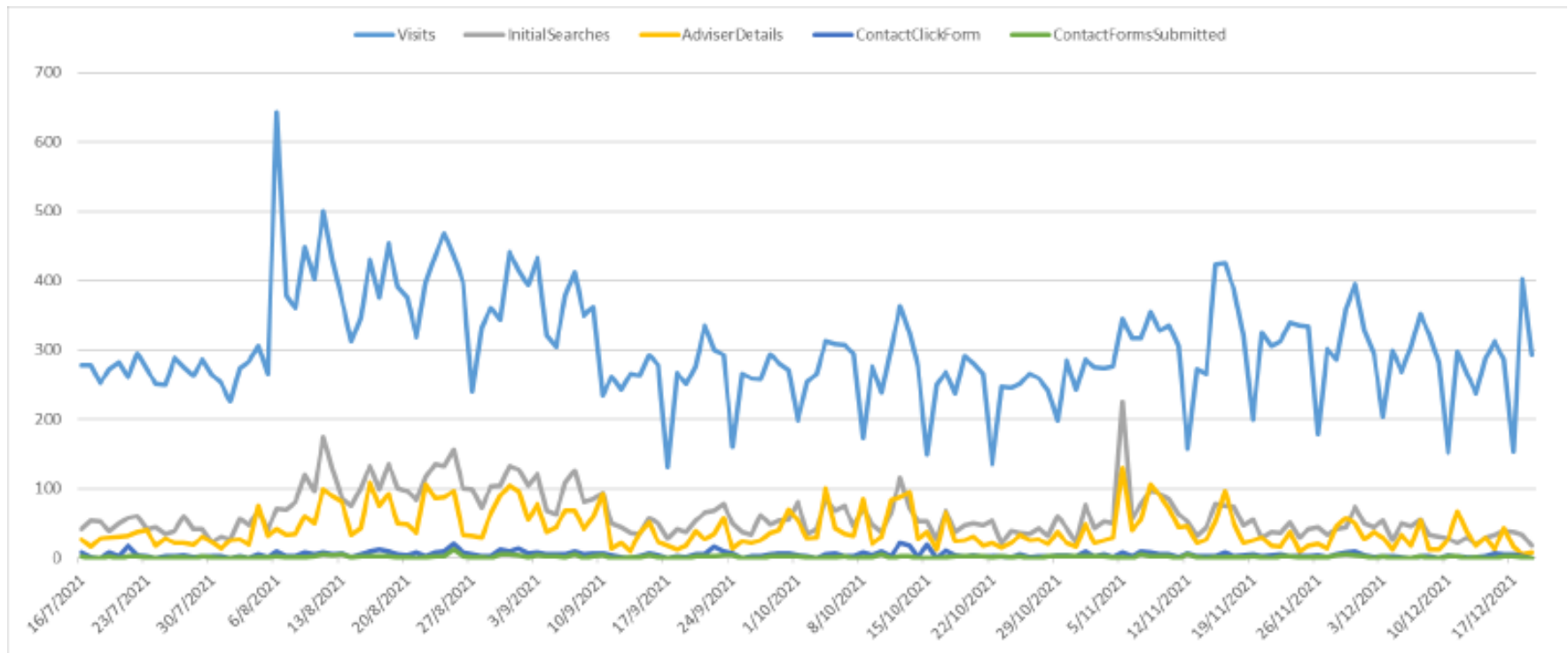
Firm Name	# of advisers at firm	# of advisers on site	%
Morgans Financial	477	178	37
Bell Potter Securities	233	47	20
Shaw and Partners	241	32	13
Ord Minnett	241	34	14
Canaccord	118	27	24

PARTICIPATING FIRMS AND ADVISERS

of advisers on site



WEBSITE PERFORMANCE - JULY TO DECEMBER



- Spike in visits aligns with Investor Update and ASX website advertising

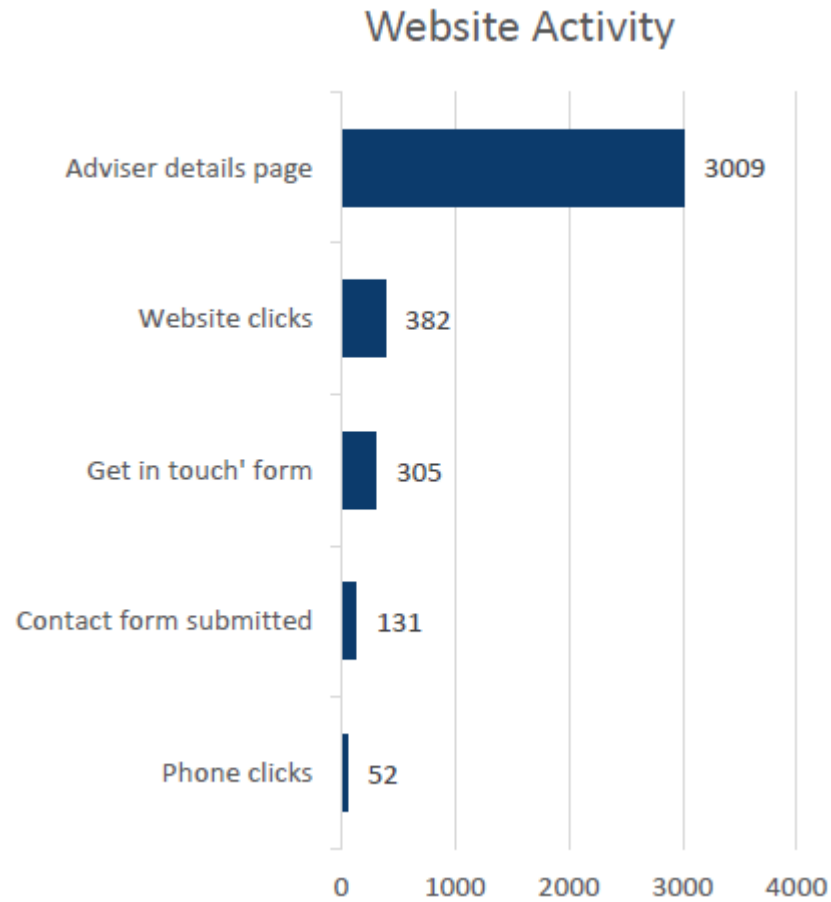
WEBSITE PERFORMANCE – JULY TO DECEMBER

YTD	Visits	Initial Searches	Conversion Rate (Initial Search)	Refined Searches	Adviser Details	Conversion Rate (Adviser Page)
Total	47,591	9,837	21%	16,428	6,542	67%
Daily Average	303	63		105	42	
Daily Target	905	187	21%		124	67%

WEBSITE PERFORMANCE – JULY TO DECEMBER

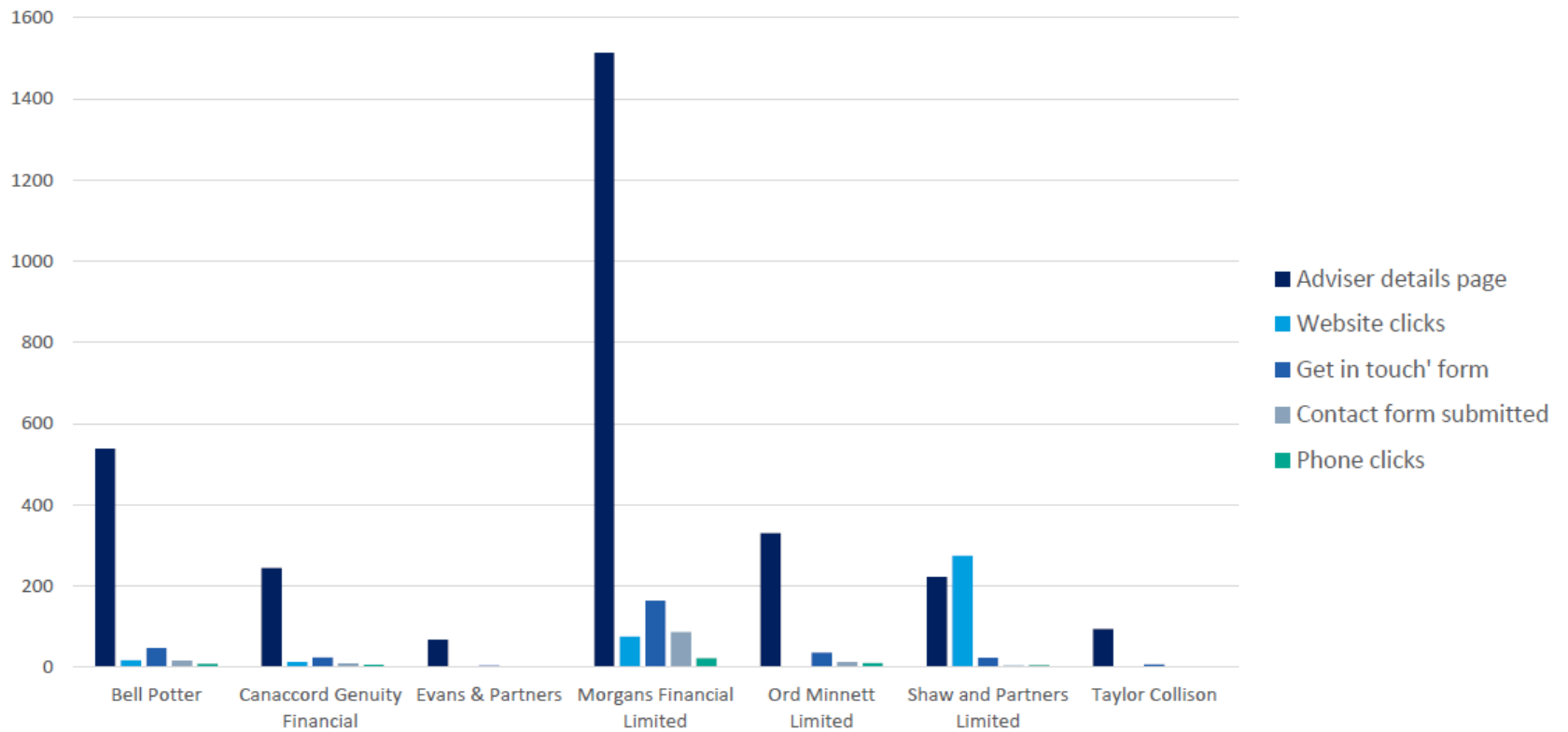
YTD	Click Contact Form	Conversion Rate (Click Contact Form)	Contact Forms Submitted	Conversion Rate (Submit Contact Form)	Website Clicks
Total	769	12%	263	34%	705
Daily Average	5		1.7		4.5
Daily Target	15	12%	5	34%	

WEBSITE PERFORMANCE (LAST 90 DAYS)



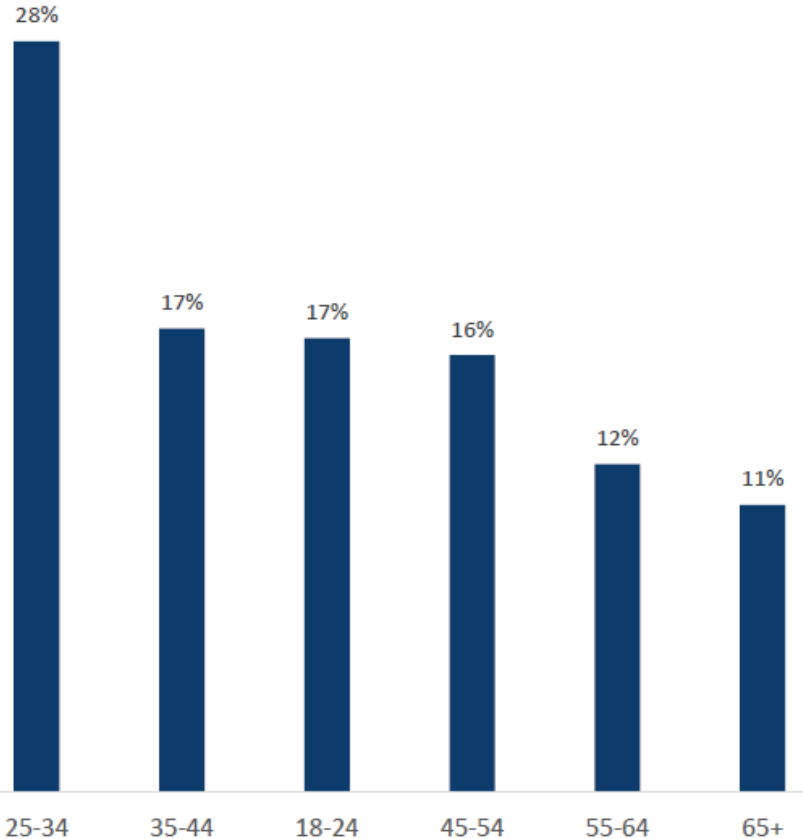
WEBSITE PERFORMANCE (LAST 90 DAYS)

Participating firm performance

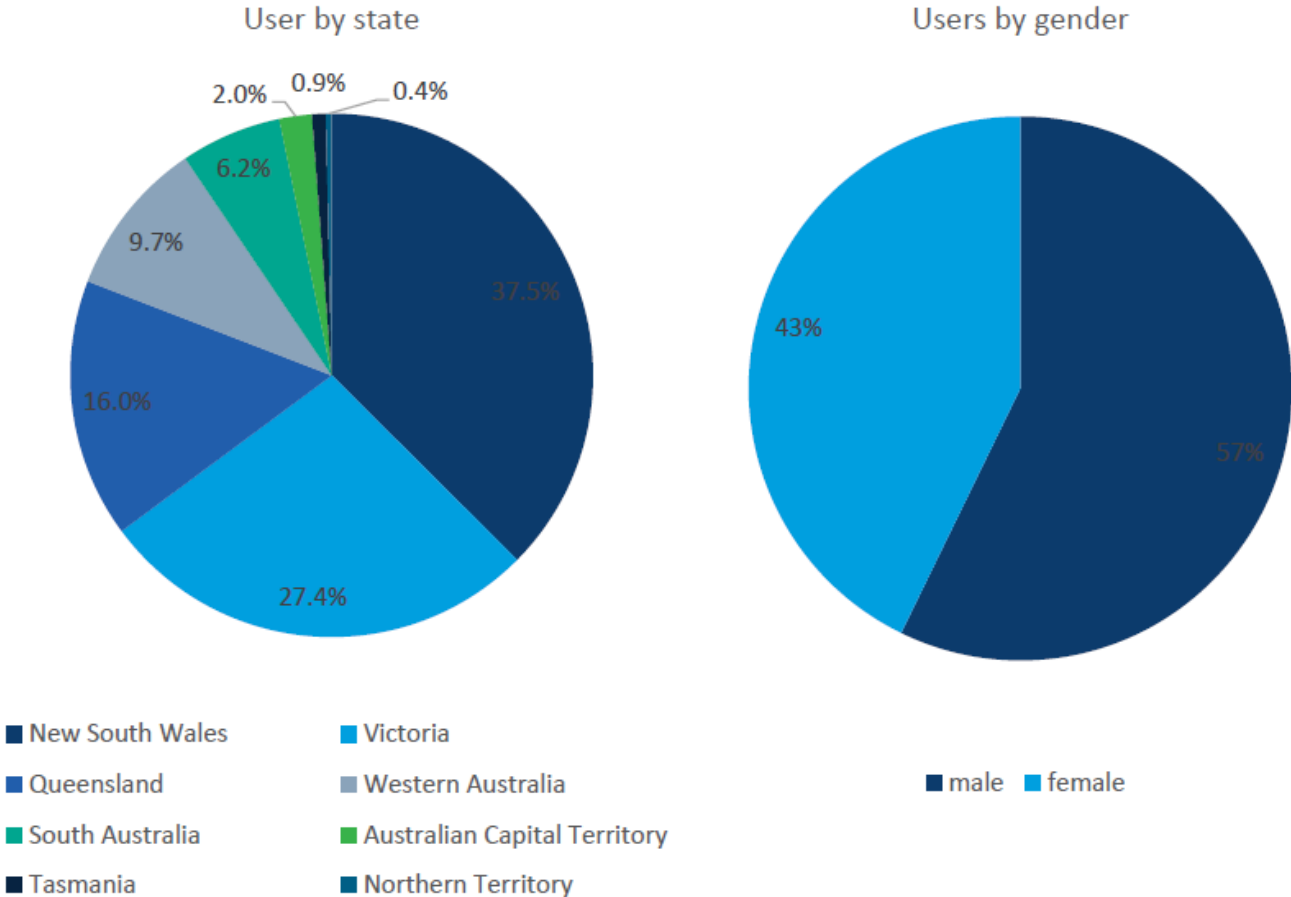


USER DEMOGRAPHIC (JULY TO DECEMBER 2021)

User by age



USER DEMOGRAPHIC (JULY TO DECEMBER 2021)



WHY CREATE A PROFILE ON THE ASX WEBSITE?

- Very easy to create a profile on the website
- Tap into a new stream of potential clients enquiring about full service stockbroking
- Other firms are benefitting from having more advisers on the website
 - Morgans have 37% of advisers on the site and are getting a lot more leads than we are
- 1 in 5 Bell Potter advisers are on the website, great to get more exposure on the website across different price points, locations and expertise
- Any email leads will be forwarded onto you by the marketing team

LEARN MORE

To learn more about setting up an account on the ASX's Find an Adviser website, reach out to the marketing team via marketing@bellpotter.com.au

BELL POTTER SECURITIES.