PRIVATE WEALTH SERVICE

FAQs

Everything you need to know about your transition to the Private Wealth Service.

Why has my account been moved to the Private Wealth Service?

Your account has been moved because the Private Wealth Service is now Bell Potter's primary investment and administration platform. The transition has been completed automatically to ensure you continue to receive a streamlined and supported investment service.

Do I need to do anything?

No. Your account has already been transitioned, and no action is required from you at this time.

Will my adviser change?

No. Your relationship with your adviser remains unchanged. They will continue to manage your portfolio and provide advice in line with your objectives.

Will my investments change?

No. Your portfolio remains in place unless changes are recommended and agreed through your usual advice process. You may notice a slight change in the reporting you receive on your investments, but it will continue to contain the same information you receive today and more.

FAQs

Can I still view my portfolio online?

Yes. You can continue to log in and view your portfolio via Client Access portal as usual.

What are the benefits of the Private Wealth Service?

The Private Wealth Service provides a more seamless way to manage your wealth, including enhanced consolidated portfolio reporting, broader investment access and improved support for tailored investment strategies.

Will I receive different reporting?

You will continue to receive quarterly and annual reporting in the same way that you have received it under the Portfolio Administration Service. You may notice enhancements to the way your portfolio information is presented over time, including more consolidated reporting across your investments.

Are there any changes to fees?

No, your fees remain unchanged. Any fees relevant to the Private Wealth Service are outlined in the attached brochure or related disclosure documents. If you have questions about how fees apply to your account, please contact your adviser.

Who should I contact if I have questions?

Please contact your adviser if you would like to discuss the transition or what the Private Wealth Service means for you.

Where can I find more information?

Further information is included in the Private Wealth Service brochure.

WE'RE HERE TO HELP

Your adviser is your best point of contact for any questions.