

BELL POTTER

PRIVATE WEALTH SERVICE

The Private Wealth Service (PWS) is the complete wealth management solution for you: personalised investment advice, active portfolio management and consolidated reporting, brought together on one integrated platform to give you clearer visibility, greater control and access to a broader range of investment opportunities across all asset classes.

As your personal and financial circumstances change, so can your investment needs. By consolidating your investments on a single, integrated platform, you and your adviser gain greater visibility, control and flexibility helping keep your strategy aligned as your goals evolve, whether you're focused on building, preserving or transferring wealth.

KEY FEATURES OF OUR SERVICE INCLUDE:

PERSONALISED ADVICE

Work with your Bell Potter adviser to shape a wealth strategy aligned to your evolving objectives, circumstances and market conditions.

BROADER INVESTMENT ACCESS

Access a wider range of investment opportunities to support sophisticated portfolio construction and diversification, including IPOs, managed funds and ETFs, international markets, alternative assets, model portfolios and gearing solutions.

CLARITY AND CONTROL

Gain a consolidated view across your holdings, performance, income and tax - supporting confident, well-informed decision-making.

SUPERANNUATION STRUCTURING

One of six core areas PWS is built to support, alongside wealth accumulation, retirement income strategies and intergenerational wealth transfer.

RETIREMENT INCOME STRATEGIES

Coordinate contribution strategy, transition-to-retirement planning and pension drawdown alongside your broader investment strategy.

GREATER VISIBILITY, REAL-TIME INSIGHTS

Consolidated reporting across portfolio valuation, performance attribution, asset allocation, income and tax, transaction history, and Bell Potter research.

LESS ADMIN, MORE TIME

Bell Potter manages corporate actions, investment correspondence and portfolio administration on your behalf, freeing up time for what matters most.

BUILT FOR YOUR EVOLVING NEEDS

As your circumstances change, a single integrated platform helps you and your adviser keep your strategy aligned with your goals.

IMPROVED DECISION MAKING

Up to date, accurate and consolidated information helps you and your adviser make timely, informed investment decisions.

SERVICE FEE TIERS

Portfolio Tier	Service Fee + Brokerage	Full-Service Fee (No Brokerage)
First \$1 million	0.85% p.a.	1.25% p.a.
Next \$2 million	0.55% p.a.	0.80% p.a.
Next \$4 million	0.44% p.a.	0.55% p.a.
Balance over \$7 million	Agreed with adviser based on portfolio complexity	
Min. Service Fee	\$4,000 p.a.	\$6,000 p.a.
Notes	Fees include GST. Brokerage is payable per trade	Fees include GST.



CONTACT US

Speak to your Bell Potter adviser to learn how the Private Wealth Service can support your investment strategy.

For more information, contact Bell Potter on:

Phone: 1300 023 557

Website: bellpotter.com.au/PWS

Disclaimer: This flyer has been prepared for general information purposes only and does not constitute financial, investment, legal or taxation advice. It does not consider the investment objectives, financial situation or needs of any particular investor or superannuation fund. Before making any financial or investment decision, you should consider your individual circumstances and seek advice from an appropriately qualified professional. You should consider whether the Private Wealth Service is appropriate for your circumstances and carefully review the Private Wealth Service Client Guide and relevant Product Disclosure Statement or information booklet before opening an account. Any fees or costs shown in this flyer are indicative estimates only and do not constitute a formal quote.