

# Delivering strategic solutions in wealth



## A broad spectrum of fit-for-purpose services to financial advice and private wealth organisations, built around your business and investment needs.

WTW's specialist Wealth Consulting team helps deliver better outcomes for your clients. You can benefit from our model portfolios and Separately Managed Accounts (SMAs), providing advice and Approved Product List (APL) formalisation, and best-in-class global fund solutions suitable for wealth groups.

### Your strategic partner

Through our tailored investment advice and range of solutions, we help you achieve your desired future state.

With WTW as your **strategic partner**, you can focus on growing your existing business and achieving your goals, while tapping into our vast global investment capabilities. Leverage our innovative and differentiated research expertise to drive better outcomes for your clients.

### Levelling the playing field

We know there are important differences between (retail and/or wholesale) wealth investors and institutions such as Superannuation Funds. WTW believes that more can be done to ensure an equal playing field.

Our unparalleled **scale, infrastructure, and experience**, gives you access to investment strategy expertise and a network of the world's best asset managers – all while significantly improving implementation outcomes and reducing costs to your clients.

**Ranked #1 in the Independent Peter Lee Client Survey for the following research and advisory categories:**



**Investment Strategy**



**Risk Advice**



**Dynamic Asset Allocation**



**Sustainability advice**

**Retaining #1 Relationship Strength position consistently in 2020, 2021, 2022, 2023 and 2024.**



## Advisory Services

- Investment strategy and asset allocation (strategic and dynamic asset allocation)
- Objectives setting and investment policy development
- Portfolio construction and global investment ideas generation
- Global Manager Research network: asset class/capital markets research
- Investment Committee advice and engagement
- Sustainable investment and ESG modelling and research
- Asset class, strategy reviews and health checks



## Implementation

- Implemented Consulting services combine our advisory services with portfolio management, operations and monitoring/reporting
- Tailored investment portfolios, with access to an unconstrained, global universe of investment opportunities
- Seamlessly implemented investment strategy, ensure your portfolio is effectively managed, via our dedicated portfolio management and operations teams
- Integrate impact investments and ESG considerations throughout the investment process

## Investment Solutions and Funds

- **Multi-Asset Funds:** WTW's diversified solutions, providing access to an institutional quality portfolio featuring our best ideas across equities, credit, real assets, and alternatives
- **Global Equity Focus Fund:** Increasing the likelihood of reliable, long-term alpha through a high active share, concentrated global equity portfolio approach
- **Alternative Credit Fund:** Complementing traditional fixed income by investing across the credit spectrum in a variety of strategies
- **Private Markets:** Accessing our best global ideas across the Private Markets spectrum, including real estate, infrastructure, private equity and private credit.
- **Hedge Advantage Fund:** A dynamic multi-manager fund investing in a portfolio of actively managed and innovative hedge funds

## What you need and how we can help

You need:	We can offer:
 <p><b>A well-resourced partner with experience in the IFA space</b></p>	<ul style="list-style-type: none"> <li>• Significant local and global capabilities covering manager research, investment strategy and portfolio management</li> <li>• Existing Australian wealth market experience in bringing institutional-grade investment capabilities to IFAs</li> <li>• A true partnership that is aligned with your investment philosophy</li> </ul>
 <p><b>Competitive long-term returns</b></p>	<p>A track record of achieving strong risk-adjusted returns for our clients via:</p> <ul style="list-style-type: none"> <li>• Long-term outperformance from manager selection</li> <li>• Dynamic asset allocation advice which has added return and reduced risk in volatile investment markets.</li> </ul>
 <p><b>Effective implementation</b></p>	<ul style="list-style-type: none"> <li>• Operational and portfolio management capabilities to create managed account or other investment solutions, and manage platform relationships</li> <li>• Scale to negotiate highly competitive fees on behalf of your clients with the world's leading investment managers</li> </ul>

### A strategic alliance: WTW and Atomos

Atomos is a large UK wealth fund with \$7b in funds under management, across 71 planners. WTW recently formed an exclusive strategic alliance with them, providing:

- Investment management for five risk-rated multi-asset funds
- Model portfolio solutions supported on retail investor platforms
- Bespoke portfolio management for high net-worth individuals.

By delegating these investment solutions, Atomos now focuses on engagement with its advisers and clients – using WTW's regular thought leadership and investment content.

This illustrates the breadth and scale of WTW's **strategic partnerships**, whether we help build better, more diverse model portfolios or provide extensive global research at a competitive cost point.

[Click here for further information](#)

### Why WTW?

Our strategic partnership provides you with our best ideas that shape your clients' investment strategy and lead to better outcomes. You reap the benefits from leveraging WTW's high quality strategy and research expertise.

Global Assets	AUM Australia, Asia + Global split			
<p><b>AUA</b> <b>\$4.8</b> trillion</p>	<p><b>AUM</b> <b>\$241</b> billion</p>	<p><b>Australia</b> \$1.85b</p>	<p><b>Asia</b> \$3b</p>	<p><b>Global</b> \$235b</p>

We have  
**48,000**  
employees

Serving more than  
**140**  
Countries and markets.





Clients  
**1400+**  
Globally

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#### About WTW

At WTW (NASDAQ: WTW), we provide data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of our colleagues serving 140 countries and markets, we help you sharpen your strategy, enhance organisational resilience, motivate your workforce and maximize performance.

Working shoulder to shoulder with you, we uncover opportunities for sustainable success—and provide perspective that moves you.

#### Disclaimer

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