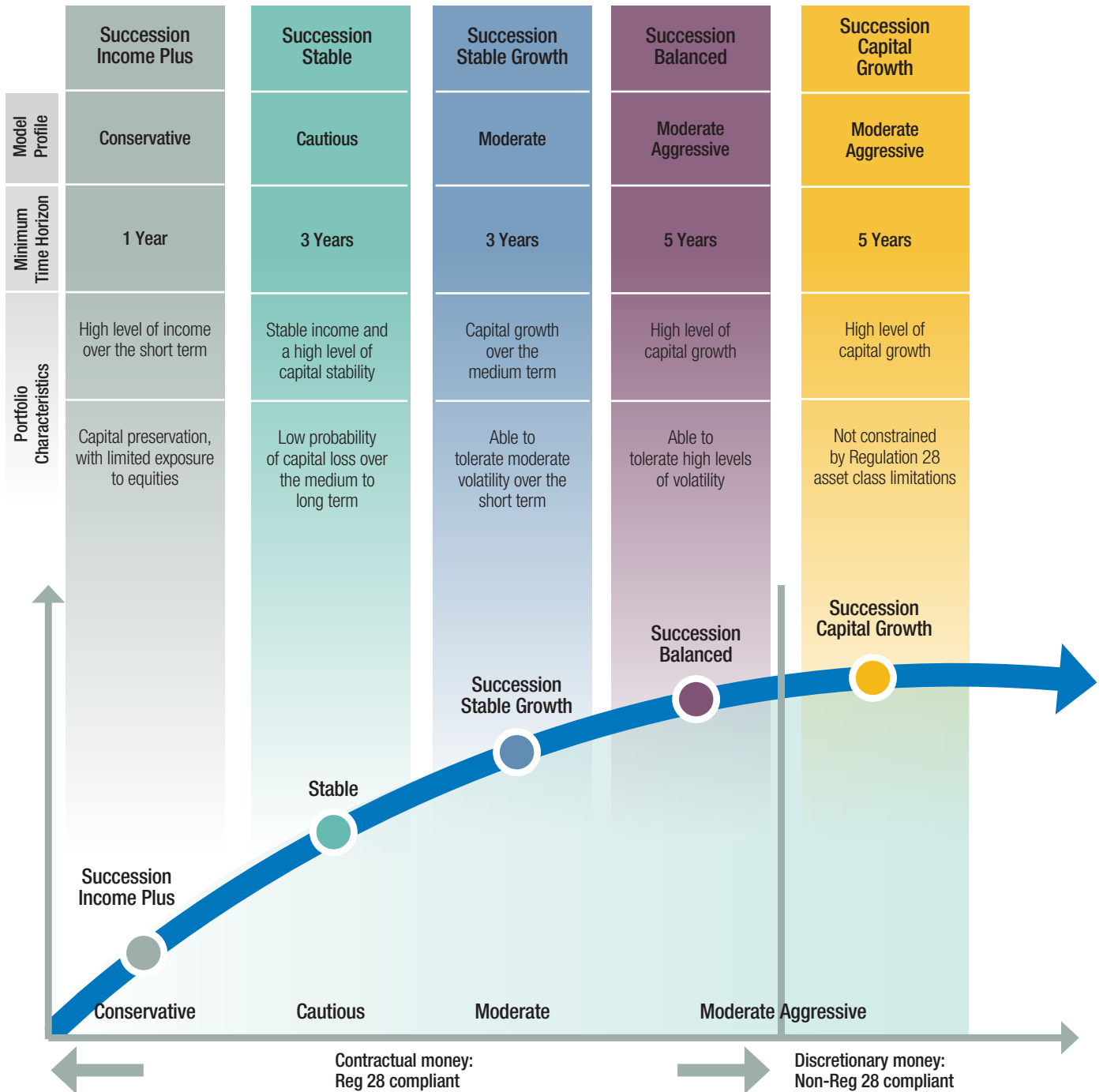


The SFP portfolios are designed to meet your needs and are actively managed to the highest standards. We select and combine skilled asset managers in our multi-managed funds, offering you a holistic and competitive solution that is positioned to achieve your stated investment goals, even as markets change and managers come and go. You can be confident that your investment needs will be well managed over time, and that you will benefit from the collaborative input of some of the industry's top investment professionals.



Our portfolios are backed by the rigorous and proven research capabilities of an expert team and as such offer you the following benefits:

**Diversification | Active Management | Monthly Reporting | Manager Research | Transparency**



Succession Financial Planning multi-asset wrap funds are designed to meet your clients' needs and are actively managed to the highest standards. Skilled asset managers are selected and combined in our multi-managed funds, offering your clients a holistic and competitive solution that is positioned to achieve their stated investment goals, even as markets change and managers come and go.

Research Capabilities	Admin efficiency through bulk switching	Communication	Peace of mind
<ul style="list-style-type: none"> <li>Solutions based on SFP advice process</li> <li>Actively managed - best investment view</li> <li>Actively managed - always aligned to risk profile</li> <li>Strong market &amp; manager research underpins IC decision making</li> </ul>	<ul style="list-style-type: none"> <li>Timeous investment decisions</li> <li>TCF compliant - similar risk profiled clients identical solutions</li> <li>Ease of managing drift</li> </ul>	<ul style="list-style-type: none"> <li>Monthly fund fact sheets</li> <li>Regional feedback sessions</li> <li>Newsletter communications</li> </ul>	<ul style="list-style-type: none"> <li>Greater focus on servicing clients</li> <li>Ability to manage client expectations</li> <li>Building a professional brand</li> <li>Meeting regulatory requirements</li> </ul>

