



SYNERGY CAPITAL MANAGEMENT

Platform Administration Services

The Synergy administration service provides you with the simplicity, choice, flexibility and confidence to grow your investments.

By providing you with a diverse range of investment options through a single source provider, you really can have the best of both worlds.

Why use a platform service?

One of the most common ways to reduce investment risk is to hold a range of diverse investments. A diversified portfolio may contain, for example, shares in several different companies and several different managed funds.

Holding more than one investment requires you to deal with each provider separately, receiving multiple reports and documentation. This can be an administrative nightmare.

A platform simplifies the complex administration and reporting requirements that come with investing in multiple areas.

Who is Synergy?

Synergy has been operating since 1994 and is a well established and respected service provider with approximately \$1.5 billion funds under administration. Synergy is wholly owned by AXA Asia Pacific holdings, a member of the Global AXA Group, one of the largest financial services groups in the world.

Advantages of using Synergy administration services?

- Easier and faster management of investments through a single point of contact for you, and your financial adviser

- Less paperwork, especially at tax time (e.g. one consolidated tax statement for all your investments)
- Consolidated regular reporting
- Ability to access account information over the phone or online
- Access to a range of investment options including wholesale managed funds from a variety of fund managers, and listed securities
- A regular savings plan (for superannuation and investment services)
- A regular withdrawal plan (for income stream and investment services)
- Insurance options such as Salary continuance, Death, and Total and Permanent Disability (for superannuation and investment services)

How does Synergy make a difference?

The Synergy administration service provides a single point of administration, so you and your financial adviser only have to deal with one company.

You receive a consolidated picture of your investments quickly and easily, and one set of documentation.

You also have access to a range of comprehensive personal insurance options with competitive premiums.



Platform Administration Services

Investing through Synergy

With one point of contact, consolidated reporting, and switching at any time, hassle-free investing is a reality.



Investing directly

Each time you need to change your details or enquire about your investments performance, the phone calls really start to add up.



Four great reasons to choose Synergy

Simplicity – The Synergy administration service simplifies your investments, giving you and your financial adviser the tools to quickly and easily manage an extensive, diversified portfolio. With Synergy Online, you have access to monitor your account 24 hours a day, seven days a week.

Choice – Synergy offers an extensive range of investment options so you can diversify your portfolio across cash, fixed interest, property and a selection of listed securities (shares) – or any combination of these.

Flexibility – A portfolio of investments that's tailored to your individual needs is vital. Should you wish to change the focus of your investment mix you can, quickly and easily, in consultation with your adviser, free of charge.

Confidence – With an educated and dedicated team administering your investments you can have peace of mind that you are in good hands. Prior to selection by Synergy, all investment options undergo extensive research in consultation with expert external investment researchers.

Synergy also provides your financial adviser with resources and state-of-the-art research tools to regularly review your financial needs and provide you with timely investment advice.

Would you like to know more?

To request a Product Disclosure Statement on any products administered by Synergy Capital Management Limited, please contact your financial adviser, or call Synergy Capital Management Limited on 1800 245 636.

Important information

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