



shares are a
piece of cake 🍒

with separately managed accounts

your choice baked to order

SMA's combine the best ingredients – direct shares, expert advice, low costs...

If you've ever considered share investing or are looking for a better way to manage your portfolio and maximise returns; the new Separately Managed Accounts (SMA's) could be the answer.

In an SMA, professionals choose, buy and sell stocks within each portfolio. You get the advantages of professional advice on your share portfolio and the cost benefits of wholesale trading while continuing to be the direct owner of the shares (not a unit holder in a managed fund) allowing you to benefit from the associated advantages including franking credits and dividends.

Additional benefits make this recipe even better. These include simple consolidated online reporting, no minimum investment requirement and the ability to integrate with your existing investment portfolio.

SMA's also work efficiently for regular investing as well as lump sums. They allow gearing and even make management of your capital gains tax liability much easier and more efficient.

Outlook Financial Solutions offers you multiple SMA portfolio styles to suit your needs and objectives. Read more about the options in this brochure and speak to Outlook to find out how an SMA can work for you.



Keep yourself completely guilt free

The sustainable investment portfolio for people who believe that 'you are what you eat.'



Watch them rise (long term growth)

Invest for the future. This portfolio focuses on the benefits of long term capital growth.



Get a taste of sweet income **now**

This portfolio is carefully selected for high yield stocks, supplementing your regular income.

the sustainable investment portfolio – guilt free



The growing importance of making decisions that are also right for the world around us has led to significant progress in sustainable investments. An increasing number of people are choosing to invest responsibly for the future. Recent trends show that this has also been a financially smart move, as sustainable investing doesn't mean compromising on performance and returns.

The SMA portfolio offered by Outlook has been developed by a group of highly reputed and experienced professionals. Stocks are hand picked by investment experts after screening by the leading rating system from Ethinvest. The Ethinvest Sustainable Rating System rates companies that contribute to the protection of our environment and a more sustainable society. It only includes companies rated **green** or **white** and excludes **black** rated companies.

Green - companies that do good

Green rated companies are involved in activities that benefit human society or the natural environment. These activities may include renewable energy, recycling, sustainable land and water use, environmental remediation, greenhouse gas reduction, education, safe workplaces, positive work cultures, improving the quality of human life, and healthcare.

White - companies that do no harm

White rated companies are not involved in activities that negatively impact the environment, damage non-plantation native forest, profit from alcohol, tobacco or gambling, negatively impact people or animals, are illegal, are involved in the mining or use of uranium, or result in the production or sale of armaments.

Only stocks that fit within the Ethinvest Sustainable Rating System and are viewed by investment experts and researchers as having strong business models, strong management and either strong total return forecasts or strong dividend yield forecasts are included in this portfolio.

The Portfolio will have an absolute return focus.

To find out more about
this portfolio contact
Outlook on **1300 657 872**.

growth option – watch them rise



SMA's are especially attractive for people investing for the medium to long term. Whether it's about putting a bit aside for the children's education or for building wealth an SMA could be the answer.

History shows that in the long term, shares have been the highest performing asset class. If you want your slice of the cake too, consider the SMA Growth portfolio. With professionals selecting and managing your share portfolio on a regular basis, SMA's are an intelligent way to taste the success that so many others have already enjoyed.

And best of all, you don't have to wait to start building wealth through shares. Start your SMA portfolio with a

lump sum or initiate a regular investing plan with any amount that you can spare.

For those who really want to enhance the flavour you could borrow to invest. Instalment gearing is a concept that can show great results because it gives you the benefits of regular investing and the tax advantages of gearing.

To find out more about this portfolio contact Outlook on **1300 657 872**.

income portfolio – taste the sweet benefits **now**

If you are looking for a professionally managed share portfolio that gives you good returns now - the Income Portfolio could be the answer.

This portfolio is suited to investors who want a concentrated portfolio of listed Australian shares, with an emphasis on income producing stocks seeking above market average tax effective income.

Whether you are looking for a way to add another dimension to your existing investment portfolio or simply augment your earned income, this portfolio offers a simple and effective way to do so.

Historical trends have shown that shares can offer better returns in the long term even when compared to property. In addition, tax benefits like franking credits make shares an even more attractive income earning asset.

Call Outlook on 1300 657 872 and find out how the income portfolio may apply to your circumstances.



Outlook caters to your taste



Outlook Financial Solutions has enlisted the expertise and skill of some of the best professionals in the investment industry to bring you a smart, simple and cost effective way of share investing.

SMA's give you the advantages of ongoing professional management of your share portfolio. The flexibility of SMA's allows you to blend portfolios, manage CGT better, access consolidated reporting and even retain shares that you may already own. Speak to an Outlook adviser to find out how SMA's may be of benefit to your situation.

Outlook is a specialist financial advisory business focussed on bringing you complete and integrated financial solutions in a cost effective way. We strive to provide you with advice that's most appropriate for your personal circumstances.

Outlook Financial Solutions is a member of Snowball Group Limited (Snowball). Outlook is a specialist financial services organisation created to help clients achieve their financial and lifestyle goals in the most effective manner. Outlook has its own AFSL (Australian Financial Services Licence) for provision of general and personal advice. The holding company, Snowball, is listed on the ASX. Management, founders and staff, in aggregate, are significant shareholders.

When you choose Outlook, you gain the benefits of a complete financial services solution that is dynamic, flexible and created to satisfy your particular requirements. Your individual needs are a priority at Outlook. Our flexibility ensures that Outlook can provide the right solution for you.

Call Outlook on **1300 657 872** to learn more about SMA's and find out if they are an appropriate investment option for your circumstances.



®looking out for you

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