



Pitcher Partners Investment Services Pty Ltd

# Investment services



## Who we *are*

### Truly independent advisors

We understand that the investment advice and wealth management market is complex. Many advisors have commercial links to related product and service providers like banks, brokers and other intermediaries. But we are different – Pitcher Partners Investment Services (PPIS) commit to giving advice that is independently researched, providing you with a wide range of investment options and is fee-only with no commissions. We can and do make recommendations to you based only on what is in your best interests. We are proud to be truly independent.

## Why work with *us*

### Our difference is the relationship

When you work with us, you'll enjoy friendly, responsive service and all the technical skills and experience you'd expect from a leading firm. But what sets us apart is the effort we put into building great relationships. The way we listen. The questions we ask. And our determination to understand every part of your business. Especially you.

### Success is better shared

Our success comes from the client first, partner led approach we bring to every engagement. Our partners invest time in getting to know you, your business and your goals. Because we know our clients well, we deliver tailored commercial advice to help you make the best decisions.

### Personal is great for business

The better we know you, the more we can help. The depth of insight we gain as we work collaboratively with you allows us to identify better opportunities. Challenge you when it makes sense. And offer clarity when it's critical. Our difference is the relationship we build together and the way it will drive you forward. It's the way we make business *personal*.

## How we can *help*

We have a broad range of capabilities, carefully refined over years of listening to clients across all sectors. We are trusted advisors that identify real opportunities for our clients; understanding their unique story, appreciating their vision, challenging their thinking and helping build their plan.

No matter where you are in your journey, *we can help*.

## Our *services*

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### *Portfolio management*

Our portfolio management does just that – comprehensively manages your investments. We'll advise on investments, monitor the market and your portfolio, and take care of all the admin in the process – tailoring your portfolio to your needs and objectives. Our portfolio guidelines help to build you a diverse portfolio across asset classes, geographies, and industries as well as investment managers and styles. With a specialist team at your service, you can rest assured that your portfolio is in good hands.

And our strong relationships with a range of brokers, specialist firms and financial institutions mean we can offer a range of independently researched and monitored investment opportunities. We have negotiated discounted brokerage with our panel of brokers too, and any commissions received are rebated back to the client in full.

## Communication is *key*

We'll keep you up to date with quarterly portfolio reports, including performance (benchmarked to market returns), asset allocation, income and expenses. You can check in on your portfolio via our online portal too. We're committed to regular and transparent communication. You can reach out to your advisor any time, and we schedule regular catch ups to keep you on top of things, review your investment strategy, and identify any opportunities as the market evolves.

## Keeping fees *simple*

Our fees are simple too. We'll charge you on a quarterly basis in arrears, based on the size and complexity of your portfolio (excluding cash). And our services are non-discretionary – you approve every investment and can revoke our services at any time. Because our aim is to provide easy to understand and comprehensive investment advice, so that you feel confident and comfortable with your portfolio.

## Advice grounded in *expert research*

Our independent research team regularly monitors a range of economic data to help give you up-to-date, proactive investment advice.

All investments are approved by our Investment Committee only after satisfying a rigorous quantitative and qualitative analysis. Then they are monitored regularly for performance, changes to management, changes to outlook and other factors that might impact viability.

## Helping you invest *responsibly*

PPIS is a member of the Responsible Investment Association of Australasia (RIAA), a leading organisation that promotes responsible investment and training for financial services firms. And we are proud to say we are a member - one of the first financial advisory groups to achieve certification.

Many of our Melbourne advisors have already achieved individual certification from RIAA, which means they have the training, knowledge, and experience to give tailored advice in responsible investing.

PPIS has also developed a Responsible Investment Charter outlining the processes and procedures when offering responsible investment advice.




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Pitcher Partners Investment Services holds an Australian Financial Services Licence (No. 229887).

We are a Professional Practice of the Financial Planning Association and all of our advisors are Certified Financial Planners™. Our advisors are experienced in financial markets and hold relevant industry qualifications specialising in applied finance and investment.

Our in-house research team of five specialists brings deep market knowledge and the highest level of technical and analytical skill to bear in selecting and monitoring investments.

Our advisers and research team are supported by a compliance, systems administration and banking teams that bring the highest level of checks and balances to the management of your portfolios to help ensure their safety and security.

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