

North, tomorrow's platform for today's adviser



North. Your online model portfolio platform.

Creating and maintaining the right diversified blend of defensive and growth assets can take time. With North's model portfolios, you can build the ideal investment mix for each individual client across managed funds and equities.

Of course, every client is different and has unique needs. But many clients share common traits. You can use North's bulk transactions and customised models to blend commonality with specific client needs – truly the best of both worlds.

Model portfolios mean more efficient client reviews and more time to focus on delivering quality financial advice.

Here are eight good reasons why North's model portfolios can improve the efficiency of your business.

1 Take ownership for your client

North allows you to tailor models to individual client needs. Create your own model with asset allocations to match client requirements and customise at your convenience.

2 Tilt to add the personal touch

With our industry on the cusp of legislative change, demonstrating the value you're adding will become even more important. North's model portfolios give you the personal touch. North lets you tilt allocations by including or excluding assets to suit individual client needs. It's up close and personal.

3 Rebalance for improved efficiency

Rebalance a model with the click of a button – buy/sells will be sent to market immediately. You can also set up investment profile thresholds that will trigger an automatic rebalance.

4 Work smarter, not harder

Bulk transactions make administration a breeze. You can apply models, make trades and perform rebalances in bulk for groups of clients, reducing duplication.

5 Share for success

Good ideas are worth sharing. You can share previously established model portfolio allocations with advisers or paraplanners from your practice.

6 Choose from a wide range of investments

You can create a model portfolio from North's complete investment menu, including single and multi-manager funds, direct shares and exchange traded funds. That's real choice for you and your clients.

7 Nest models

Save even more time by nesting – ie where a client would have two or more model portfolios running alongside each other to meet specific needs. For example, a moderately defensive model alongside a high growth model as part of an allocated pension strategy.

8 Guarantee models

You can even place one of our award-winning guarantees over a model portfolio, as long as the assets are on the guarantee menu.



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How to get started

There are a number of ways you can start enjoying the benefits of North:

- **Register for North Online today:** Visit north.axa.com.au today and register to start your journey North.
- **Interactive training sessions:** Our expert North Service Centre consultants can help navigate you through North by remotely accessing your screen views to walk you through your first application, help you find information or resolve any issues.
- **Online tools:** Access online tutorials and User Guides designed to provide you with all the information on the benefits and features of North.

Like to know more?

To find out more about model portfolios on North visit north.axa.com.au or talk to your business development manager on 1800 655 655.

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