



# Guide to Macquarie's Wrap evolution

Recent changes to Macquarie Wrap

23 NOVEMBER 2019

At Macquarie, we're investing in a multi-year wealth platform evolution. We launched the first part of our evolution – our client portal and mobile app – last year. Since then, we've been meeting with advisers and hearing more about what they need to help their firms thrive. We're listening – and now we've launched the next phase of our evolution.

## What's changing?

1. **Solutions to meet more needs of more clients.** We've launched Macquarie Consolidator II, with two investment menu options:

- Macquarie Consolidator II **Engage**: Clients with less complex portfolios can now access a right-sized menu of cash, term deposits, insurance and SMAs.
- Macquarie Consolidator II **Elevate**: Clients with evolving complexity and diversification can access a comprehensive suite of cash, insurance and a full suite of investment options.

2. **Improved cost efficiencies.** We've launched improved pricing offers across our Macquarie Wrap suite: Macquarie Consolidator II and Macquarie Manager II.

Clients with accounts that use our previous Macquarie Manager and Macquarie Consolidator products will be able to continue using those products.

3. **An evolving digital experience.** You can access Macquarie Consolidator II and Macquarie Manager II through Adviser Online, our redesigned adviser portal. Over time, you'll be able to use Adviser Online as a simple, intuitive online hub where you can manage all your clients' cash and wrap requirements. During the launch period, our existing adviser portal will also remain open for you to access your clients' accounts.

Throughout the launch, our commitment is to a seamless experience for you and your clients. We're prioritising accuracy, compliance, stability and proactive risk management.

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## Products at a glance | Macquarie Consolidator II - Engage and Macquarie Consolidator II - Elevate

	MACQUARIE CONSOLIDATOR II - ENGAGE		MACQUARIE CONSOLIDATOR II - ELEVATE	
	A product for clients with less complex portfolios		A full service product for clients with larger portfolios with diversification	
	Investment (inc SMSF)	Super and Pension	Investment (inc SMSF)	Super and Pension
Minimum investment	\$10,000	\$10,000	\$10,000	\$10,000
Minimum cash holding	\$500	\$500	\$1,000	\$1,000
Insurance options - Zurich, TAL, AIA, OnePath	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Easy to port to other Macquarie Wrap products (including Consolidator II - Elevate)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fees	\$240 p.a. flat fee	\$264 p.a. flat fee	Tiered admin fees + account keeping fee	Tiered admin fees + account keeping fee
Choice of:				
SMA's	<input checked="" type="checkbox"/> 6 index and active SMA's	<input checked="" type="checkbox"/> 6 index and active SMA's	<input checked="" type="checkbox"/> Over 160 models from over 45 investment managers	<input checked="" type="checkbox"/> Over 160 models from over 45 investment managers
Managed funds	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 600 + managed funds	<input checked="" type="checkbox"/> 600 + managed funds
Australian listed securities	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Global listed securities	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Domestic fixed income	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Multiple term deposit providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fee aggregation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## We're supporting you through the launch

As part of the launch of the new products and pricing, we'll support you with:

- Information to help you communicate the benefits of the launch to your clients
- Fee calculators
- How-to guides for your team
- Adviser and support staff training webinars
- The launch of an online help centre.

You also have the ongoing specialist phone-based and face-to-face support of our team of professionals.

## Need more information?

Contact your **Macquarie Business Development Manager** or email [wealthsales@macquarie.com](mailto:wealthsales@macquarie.com)

### Important information

The information in this document is current as at 23 November 2019.

The Macquarie Wrap Consolidator II and Macquarie Wrap Manager II products referred to in this information are issued by Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281 (MIML). The relevant Product Disclosure Statement is available on the Macquarie Wrap website and each investor should consider the Product Disclosure Statement in deciding whether to acquire, or continue to hold the relevant Macquarie Wrap Consolidator II and Macquarie Wrap Manager II products.

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