

## Comet Wrap Service

**Warning:** This information is intended to form general comments only and does not constitute advice. No investor should rely solely on this information when making investment decisions. This information has not been prepared to take account of investment objectives, financial situations or the particular needs of investors. Investors should consult their client adviser, who can assess their particular needs and circumstances when making investment decisions.

Managing your investments and superannuation can be both time-consuming and frustrating. Even the simplest investment portfolio can involve a number of different investments with different managers, that each generate numerous transaction confirmations, statements, tax summaries and end of year reports.

So, what's the solution?

One popular approach is to invest using an investment portfolio management account or 'Wrap' account, which 'wraps' all your investments into one easy-to-manage service.

A Wrap account is a sophisticated yet simple tool which 'wraps' your portfolio of shares, managed funds, margin loans and other investments into one easy-to-manage parcel which can be managed online.

Many Australians now invest using a Wrap-type service - because they offer a simpler, more effective way to manage an investment portfolio.

The **Comet Wrap Service** is the dedicated Wrap account for Managed Financial Strategy, drawing on the services of the well resourced BT Financial Group. BT is one of Australia's leading Wrap providers.

### Who can use the Comet Wrap Service?

The **Comet Wrap Service** is suitable to a range of investors that may include professionals, self employed, PAYG employees, retirees, self managed superannuation funds, Unit Trusts and company structures as an indication. **Comet Wrap Service** is available to all investors with over \$50 000 to invest.

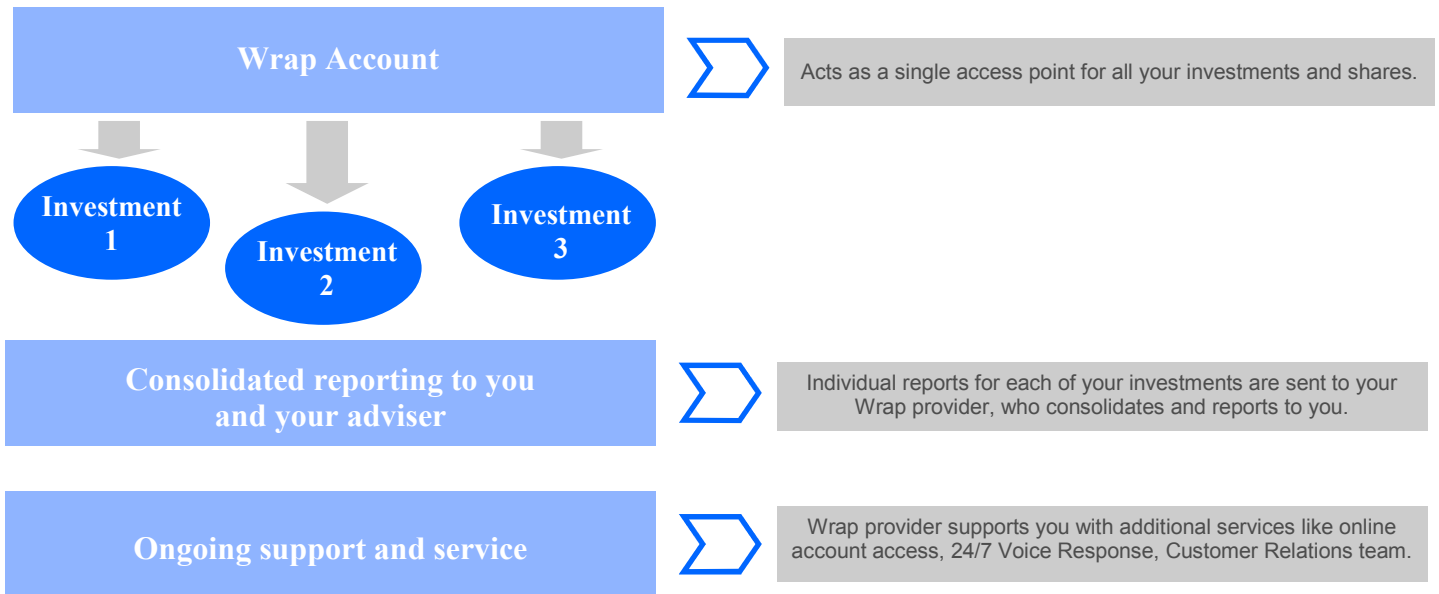
### The features and benefits to utilising the Comet Wrap Service:

- Access to over 550 wholesale managed funds.
- Access to all Australian Stock Exchange listed securities.
- Consolidating all your investment information and providing a tailored set of simple, yet comprehensive, investment reports so you can take control.
- The consolidated reports set out all the information required for tax reporting on your portfolio.
- The transparent fee structure sets out all fees paid by you for the Wrap account, the managed funds in which you invest, and for financial advice - so you know exactly where your money is going.
- The ability to control your portfolio by switching investment options with ease depending on your changing circumstances, economic conditions or investment management changes.
- Make regular investment / contributions or alternatively regular withdrawals from your portfolio.
- Online account access 24 hours a day.
- SuperWrap Accounts smoothly transition into pension accounts on your retirement without having to sell down underlying investments.

### In this issue

Comet Wrap Service the easy way to manage your superannuation and investments.

The above listed features and benefits are incorporated within the Comet Wrap Account and Comet SuperWrap Accounts, where your superannuation savings also have access to this innovative investment tool.



### Comet Wrap Service for Smaller Portfolios:

The Comet Wrap Accounts are suited to those investors with funds of at least \$50,000. For those investors starting out with less than this amount Comet provides access to a range of retail investment choices within a smaller version of the platform; Wrap Essentials or SuperWrap Essentials.

Comet Wrap Essentials and Comet SuperWrap Essentials offers access to:

- Over 57 retail managed funds
- Comprehensive consolidated reporting
- Margin lending facility
- Regular investment / contributions and withdrawal plans
- Online access 24 hours a day

### Summary

Whether you are investing for the long-term for your retirement, or for a short-term project, the Comet Wrap Service is designed to help you effectively manage your investments as your needs change throughout the various stages of your life.

Full details of the **Comet Wrap Service** range of portfolio solutions can be found in the relevant Product Disclosure Statement (PDS). The PDS is the complete and governing document in regards to all matters relating to the **Comet Wrap Service**. The PDS is available on request from our office.

**Disclaimer:** This publication contains general information only and is not intended to constitute financial product advice. Any information provided or conclusions made, whether express or implied, do not take into account the investment objectives, financial situation and particular needs of an investor. It should not be relied upon as a substitute for professional advice.



**managed.financial strategy ltd**  
AFS licence no. 222600

PO Box 7074  
30 Lisburn Street  
East Brisbane Qld 4169

**Telephone:** 07 3391 5055  
**Facsimile:** 07 3391 1711  
**Email:** super@managed.com.au  
**www.managed.com.au**