

13 July 2017

Federation Alliance enhances platform offering

Financial advisers can access new investment opportunities and drive further efficiencies in managing their client portfolios following Federation Alliance's launch of its new-look adviser portal.

The new tablet-friendly adviser portal has been designed in response to adviser feedback and focuses on useability, streamlined navigation and includes dashboards that provide snapshots of important client metrics, market data and tracking tools.

Alan Kenny, CEO of Federation Alliance said advisers are already embracing the new portal's flexible in-depth portfolio reporting, comprehensive order management and multicurrency administration.

"A key advantage of the new portal is the control and visibility it provides advisers to analyse and report on client portfolios by drilling down and grouping securities valuations and performance across the assets of model portfolios and self-directed investments", he said.

Mr Kenny said advisers can proactively service their super and pension clients with a new dashboard to access critical information such as benefit details, contributions, pension payments and beneficiary nominations as well as initiating and tracking the progress of rollovers.

Federation has also introduced a new platform-integrated term deposit facility which provides advisers and their clients the choice of eight ADIs across a broad range of terms.

"People are used to shopping around for the best term deposit interest rate, so it made sense to offer a wider selection than is ordinarily available on platforms to find that better rate" Mr Kenny said.

"Through Federation, adviser's clients can now take out a term deposit online and hold it individually as part of a diversified investment portfolio without the need for additional paperwork", he said.

Federation Alliance also offers a choice of 14 Separately Managed Account (SMA) model portfolios including two new direct equity-based SMA model portfolios recently listed by BT Investment Management and Australian Unity's financial advice business.

The new SMA model portfolios are designed to provide advisers' clients the benefits of direct share ownership within a transparent professionally managed SMA structure.

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Further information

Federation Managed Accounts ARSN 163 784 432 is issued by Australian Unity Funds Management Limited ABN 60 071 497 115, AFSL 234454. The Federation Alliance Superannuation Fund (Federation Super TM) ABN 20 543 903 424 is issued by Diversa Trustees Limited ABN 49 006 421 638, RSE Licence No. L0000635, AFSL 235153. Federation Super TM is a trademark owned by Australian Unity Funds Management Limited, 'Federation' is the collective name for Federation Managed Accounts and Federation Super TM.

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