Power2 Brisbane Pty Ltd ABN 15 158 390 937
Corporate Authorised Representative of
Power 2 Financial Services Pty Ltd ABN 51 164 747 595 AFSL No. 444078

Power2
• ACCOUNTING • FINANCIAL ADVICE •

Why consider a managed fund?

At Power2, we appreciate that selecting a firm to entrust with your accounting, financial services, business development and mentoring requirements is an important decision, intensified by rapid economic changes, increases in competitive pressures, and resource availability.

With our holistic approach, our professional team of **accountants** and **financial planners** are here to help you to make **good financial decisions every day**.

Contact us for a no obligation discussion.

This information is general advice only and does not take into account your personal objectives, financial situation or needs. Before acting on this information you should consider the appropriateness of the information in light of your own circumstances. When deciding whether to acquire or continue to hold a financial product, you should first obtain and consider the Product Disclosure Statement, which can be obtained from your financial adviser or directly from the product issuer.

Information current at time of writing.

Contact Us:

Slacks Creek Qld 4127
196 Kingston Road
T: 07 3808 2868

Moorooka Qld 4105
3 Mayfield Road
T: 07 3848 0201

E: info@power2brisbane.com.au
W: www.power2brisbane.com.au

In a managed fund, investors' dollars are pooled and invested by a professional fund manager on your behalf. Ownership of the direct asset is held by the managed fund and the investor owns a number of "units" in the managed fund. The value of the investor's units will increase or decrease in line with the performance of the underlying assets of the fund.

There are different types of managed funds. Some focus on one particular asset class, eg Australian shares. Others invest in a combination of assets - across Australian shares, international shares, property, fixed interest and cash.

Expertise - a professional fund manager conducts qualitative and quantitative research and invests on your behalf.

Diversification - your funds can be spread across a number of assets and/or asset classes. Say, for example, an investor has $10,000 and wishes to invest in shares. Investing directly, they could realistically only buy one or two stocks in a cost effective manner. By pooling their money into a managed fund, they can potentially gain access to twenty or more stocks. Diversification is important to reduce investment risk and smooth out investment returns over the longer term.

Access to a wider investment universe - often, you can obtain access to investments that would not normally be available to an individual retail investor.

Ease of management - your funds are invested and managed on your behalf. Investors are provided with regular reports on the value of their investment and how it is performing. Following 30 June each year, the manager will provide you with an annual tax summary statement that can be used in preparing your tax return.

Ongoing savings - many managed funds offer investors the ability to add regular amounts to the investment via direct debit. This can be a convenient way to dollar cost average into a market or to gradually build an investment portfolio over time.

Speak to one of our friendly advisers to find out more about managed funds or other types of investments that might be suitable for you.