

North, tomorrow's platform for today's adviser



North. Your online direct share trading platform

As your clients mature and travel further along their life journey, their financial needs grow more sophisticated.

Many clients start looking to invest directly in the stockmarket to build their wealth and diversify their portfolios.

Better for your clients, better for your business

Direct shares not only benefit your clients, they can also benefit your business.

Direct access to share trading can help you attract an increasingly diverse set of clients and grow your business – and it's a fact that advisers who use more direct shares tend to have greater average funds under advice than those who don't.*

With North's direct share trading you now have greater scope and flexibility to manage your clients' portfolios.

* 2010 Investment Trends Planner
Direct Equities (& SMA) Report.

Here are 12 good reasons why North should be your online direct share trading platform.

1 Access a wide choice of shares

North is all about choice. Ordinary money investors can trade all ASX listed securities, while super and pension investors can trade the top ASX300 and a range of listed funds, companies and trusts.

2 Trade shares in real time

No delays. No forms. No unnecessary middle-men. North's real-time trading means just that – your clients' trading instructions are placed directly with our broker partner CORE securities, making your business processes even more efficient.

3 Access exchange-traded funds

There's a real buzz about exchange-traded funds (ETFs) at the moment and for good reason. They are efficient, tax effective and a great way to gain exposure to a diverse variety of assets. North lets you trade in a broad selection of ETFs as well as shares.

4 Use model portfolios

Tilt, rebalance, customise, nest...North's model portfolios allow you to reduce administration and increase efficiency. You can incorporate direct shares into model portfolios, along with North's full range of managed funds.

5 Keep track of corporate actions

Share offers, IPOs, dividend releases – it's a busy market out there and your clients don't want to miss any of the action. North's corporate actions capability means you can easily keep track of market activity, and with individual holder identification numbers (HINs), take full control of your clients' elections.

6 Make bulk transactions

As your business grows and you take on more clients, the last thing you need is to be performing the same tasks over and over again. With North you can execute client instructions for buys and sells through bulk trading screens, rebalance multiple portfolios and process transactions across groups of clients. It's quick, simple and efficient.



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financial services

7 Give your clients the ability to trade shares

North puts you in full control of how you service your clients. You can tailor your service model so clients can log in to view details and even make trades if you allow.

8 Read the latest news and research

The market never sleeps and you need 24/7 access to global developments. North's news and research portal puts all the latest sharemarket and company news at your fingertips, with watchlists, live prices, company announcements, market information and corporate research.

9 Enjoy competitive rates

With rates starting from as little as \$34 for trades and \$25 for in specie transfers, North's prices are among the most competitive in the marketplace.

10 Make in specie transfers

Many clients are likely to have accumulated the odd share parcel here and there over the years, creating extra paperwork. You can transfer external share holdings onto North and consolidate your clients' total share holdings into a single portfolio.

11 Choose to reinvest or take profits

One of the most attractive aspects of direct share trading is creating regular dividend income for your clients as well as generating potential capital growth. With North your clients can choose either to take profits or automatically reinvest their share dividends at an account level.

12 Reduce overall administration

Using one platform for new business means you can improve efficiency, save time and keep costs down. North lets you:

- trade easily and quickly without signatures using managed discretionary accounts
- use dollar cost averaging to make regular set investments into shares and managed funds
- integrate equity trading with leading financial planning software applications – Visiplan, XPlan and Coin
- generate consolidated client review reporting.

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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 from North Online.

Like to know more?

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



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